



# RECLASSIFICATION IN ACTION: JOB RESPONSIBILITIES EXAMPLE

## POSITION TYPE: ENTRY-LEVEL POSITIONS

Reclassification in higher education involves evaluating and adjusting a staff role, responsibilities, title, and compensation to better align with institutional needs, job complexity, and evolving organizational structures. This process can support staff retention, professional development, and career mobility for financial aid offices while ensuring the position reflects current regulatory requirements and operational demands.

This example illustrates the “before” and “after” job responsibilities for **entry-level positions** in a financial aid office. It is intended to provide a practical, anonymized reference for offices considering similar changes, highlighting how this position’s duties, scope, and responsibilities evolved through the reclassification process.<sup>1</sup>

Learn more about the overall work on reclassification at [nasfaa.org/reclassification](https://nasfaa.org/reclassification).

Explore full job descriptions in NASFAA’s Community Resource Library at [nasfaa.org/community\\_library](https://nasfaa.org/community_library) and [nasfaa.org/position\\_descriptions](https://nasfaa.org/position_descriptions).

### JOB TYPE: FINANCIAL AID ADVISOR (LOANS)

**Before:** This position focused on supporting the loan process for students and parents. Primary duties centered on loan authorization, disbursement, reconciliation, and operational support to the Associate Director of Loans. Responsibilities included assisting with drawdowns, managing daily loan processing tasks, and responding to student inquiries related to loan programs. The role involved limited supervisory or strategic responsibilities, emphasizing transactional processing and individual case resolution.

**After:** The updated position reflects an expanded role in managing the Direct Loan program, including full reconciliation responsibilities, serving as a primary point of contact for student and parent loan questions, and providing broader oversight of compliance and reporting requirements. The position now includes increased time allocation for reconciliation, customer service, and interdepartmental coordination, with greater emphasis on ensuring accurate and timely processing aligned with federal regulations. While supporting the Associate Director, the role’s scope and complexity have increased to encompass more independent decision-making and program oversight.

### KEY CHANGES

Before	After
Assisted with loan authorization, disbursement, and reconciliation under supervision.	Independently manages Direct Loan reconciliation and ensures compliance with federal requirements.
Provided general loan processing support.	Serves as the primary point of contact for student and parent loan questions.
Focused primarily on transactional tasks.	Expanded responsibilities to include program oversight and interdepartmental coordination.
Limited strategic or compliance duties.	Increased emphasis on compliance, reporting, and process accuracy.

<sup>1</sup> This summary was written with the assistance of generative AI, 2025.

## JOB TYPE: FINANCIAL AID FISCAL SUPPORT TECHNICIAN

**Before:** The position was primarily responsible for supporting the financial aid office by preparing financial records and performing accounting-related work. Duties included compiling and monitoring fiscal information for grants and categorical funds, preparing audit and financial reports, and processing federal and state transmittals. The role also involved maintaining statistical and financial records, reconciling accounts, reviewing invoices and expenditures, and assisting with clerical office support tasks. While responsibilities required accuracy and regulation compliance, the role focused mainly on transactional accounting and routine support functions.

**After:** The reclassified position continues to provide accounting and fiscal support but reflects an expanded scope and a higher level of complexity. The role now emphasizes independent judgment in applying federal and state regulations, managing categorical funding sources, and ensuring compliance with program requirements. It includes additional responsibilities such as developing financial forecasts, preparing budget narratives for grant proposals, and conducting more advanced reconciliation and reporting activities. The position also incorporates training responsibilities for support staff and a larger role in responding to auditors and external compliance reviews. Overall, the updated role emphasizes analytical work, compliance monitoring, and independent decision-making.

### KEY CHANGES

Before	After
Focused on preparing and maintaining financial records, reports, and categorical fund monitoring.	Expanded scope to include financial forecasting, budget narratives for grants, and advanced reporting.
Primarily transactional support with routine reconciliation tasks.	Greater emphasis on independent judgment, compliance monitoring, and complex reconciliation.
Assisted with clerical support, office tasks, and data entry.	Added responsibility for training support staff in budget preparation and monitoring.
Responded to auditors with a limited scope.	Plays a larger role in external audits, compliance reviews, and applying regulatory requirements.

## JOB TYPE: FINANCIAL AID TECHNICIAN

**Before:** The position was responsible for assisting the financial aid office in processing aid applications, maintaining student records, and supporting daily office operations. Duties included accepting and processing applications, entering information into the system, preparing reports, and providing customer service to students and families. The role required basic knowledge of financial aid policies and procedures but focused largely on clerical and transactional functions with limited independent decision-making.

**After:** The reclassified position reflects a shift toward a more technical and decision-making role. The Financial Aid Technician now independently reviews applications, makes award determinations, and monitors ongoing student eligibility across multiple campuses. The role requires interpreting federal and state regulations, conducting needs analysis, and amending awards as circumstances change. Additional responsibilities include coordinating scholarship programs, counseling students on loan eligibility, assisting with regulatory reporting, and supporting program planning and implementation. The expanded scope emphasizes judgment, regulatory compliance, and coordination with internal and external stakeholders, elevating the position from primarily clerical processing to a more substantive role in financial aid program administration.

### KEY CHANGES

Before	After
Accepted and processed aid applications, entered data, and prepared reports.	Independently reviews applications, determines awards, and monitors student eligibility.
Provided customer service and clerical support.	Provides loan counseling, coordinates scholarships, and advises students on aid options.
Maintained records and assisted with routine reporting.	Supports regulatory reporting, program planning, and compliance implementation.
Limited scope of responsibility and decision-making.	Expanded scope with independent judgment, interpretation of regulations, and award authority.

<sup>1</sup> This summary was written with the assistance of generative AI, 2025.

# JOB TYPE: PROGRAM ASSISTANT TO STUDENT FINANCIAL SERVICES COUNSELOR

**Before:** The Program Assistant served as the first point of contact for the financial services office, greeting visitors, responding to phone, email, and in-person inquiries, and providing general information about financial aid, student accounts, and student employment. Responsibilities included maintaining the reception area, facilitating communication between stakeholders, and performing administrative and clerical support tasks. The role emphasized customer service and general office operations, with limited responsibility for direct advising or decision-making.

**After:** The reclassified Student Financial Services Counselor role reflects a significant expansion in responsibility and scope. The position now provides counseling support across financial aid, student employment, and student accounts, including processing financial aid applications, appeals, and verification. The role requires interpreting regulations, advising students and families on eligibility and payment options, and supporting compliance through accurate documentation and reporting. Additional responsibilities include collaborating with campus partners, promoting inclusion and student success, and serving as a resource on financial services processes. The updated role shifts from primarily clerical and customer service tasks to a professional counseling position requiring independent judgment and specialized knowledge.

## KEY CHANGES

Before (Program Assistant)	After (SFS Counselor)
Served as receptionist and first point of contact, greeting visitors and handling inquiries.	Provides direct counseling to students and families on financial aid, student employment, and account options.
Maintained reception area, facilitated communication, and provided general information.	Processes financial aid applications, appeals, and verification, requiring regulatory knowledge.
Performed administrative and clerical tasks (mailings, scheduling, data entry).	Expanded role in program operations, including compliance support and accurate recordkeeping.
Emphasis on customer service and administrative support.	Emphasis on professional advising, decision-making, and regulatory interpretation.

