



## FINANCIAL AID ASSISTANT I

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	49	07/01/2017	Classified	1 of 3

### DEFINITION

To perform a variety of routine activities involving the dissemination of financial aid information to students; and to perform technical and clerical tasks in the maintenance and documentation of financial aid information.

### DISTINGUISHING CHARACTERISTICS

**Financial Aid Assistant I** – Positions in this classification are focused on routine, process driven tasks and performs less complex clerical or program support assignments while learning financial aid policies and procedures. Positions at this level usually exercise less independent discretion and judgement than that of a Financial Aid Assistant II.

**Financial Aid Assistant II** - Positions in this classification are assigned to the day-to-day complex technical duties in addition to general clerical work related to the assignment. Employees in this position have experienced knowledge of financial aid programs and procedures to independently assist students, staff, and community members at the front counter, over the phone, and through written and electronic correspondence.

**Financial Aid Specialist** - Positions in this classification are responsible for performing more specialized and complex technical duties within the work unit. Employees in this position also provide training and direction to departmental staff on a regular basis.

**Financial Aid Specialist, Lead** - Positions in this classification will help train and coordinate financial aid personnel. Employees in this position serve as an assistant to the Financial Aid Manager and provides on-going technical and functional lead supervision to the office staff.

### SUPERVISION RECEIVED AND EXERCISED

- Receives supervision from a departmental supervisor or manager.
- May receive technical or functional supervision from higher-level departmental personnel.
- May provide training and direction to student assistants.

### EXAMPLES OF DUTIES

Duties may include, but are not limited to, the following:

- Provides applications, information, and assistance to students regarding available financial aid programs, such as grants, loans, scholarships, and work study opportunities.
- Reviews financial aid application forms for accuracy and completeness; secures additional information from students as necessary; processes applications using District, state, and federal database; prepares and maintains student files.
- Determines student eligibility for financial aid based upon student needs and program guidelines, policies and procedures; creates aid packages; notifies students of awards or denial of awards.
- Maintains state and federal financial aid consumer information, applications, and forms; maintains office supplies.



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- Attends workshops and trainings to remain current with relevant laws, rules and regulations.
- Assists in the development and modification of forms and procedures to ensure compliance with changing District, state and federal regulations.
- Assists in compiling, analyzing, and maintaining data for record maintenance and preparation of various reports.
- Assists in processing Federal Work Study paperwork; compiles statistical data; and processes changes in student allocations.
- Processes correspondence received by department via mail, email, and fax.
- Participates in outreach functions.
- Performs related duties as assigned.

### MINIMUM QUALIFICATIONS

Knowledge of:

- Recordkeeping rules and procedures.
- Basic mathematics.
- Modern office procedures, practices and technology/equipment.
- Modern software applications (Microsoft Office Suite, etc.)

Skill/Ability to:

- Provide accurate information to students and other financial aid personnel.
- Learn relevant laws, rules and regulations through ongoing training attendance.
- Learn, understand and apply relevant District, state and federal regulations, procedures and policies related to available loans and grants for students.
- Perform assigned tasks in a high-volume environment, often under time pressure.
- Communicate effectively, both orally and in writing.
- Handle sensitive or confidential materials and situations.
- Learn complex financial aid applications and relevant software.
- Make mathematical calculations quickly and accurately.
- Identify pertinent financial information and learn to understand how various financial aid programs operate.
- Perform a variety of clerical and recordkeeping tasks with accuracy using appropriate technology.
- Establish and maintain effective work relationships with those contacted in the performance of required duties.
- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, race, ethnicity, gender identity, sexual orientation, age, mental or physical disability, and religious background of all students, faculty and staff, and with all individuals encountered in the performance of required duties.



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### EXPERIENCE AND TRAINING

- One (1) year of experience performing clerical duties, including basic recordkeeping and significant public contact in an office environment.

### EDUCATION/LICENSE OR CERTIFICATE

- Possession of a high school diploma/GED or the equivalent.

### CONDITION OF EMPLOYMENT

- Must not have any unresolved financial issues with the U. S. Department of Education that would prohibit the ability to obtain National Student Loan Data System (NSLDS) access immediately

Adopted: 07/01/17