



FINANCIAL AID ASSISTANT II

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	53	07/01/2017	Classified	1 of 3

DEFINITION

To perform a variety of complex 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 or other assigned staff.

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 databases; prepares and maintains student files.
- Provides direct loan entrance counseling to students.
- 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.



FINANCIAL AID ASSISTANT II

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	53	07/01/2017	Classified	2 of 3

- Maintains state and federal financial aid consumer information, applications, and forms; maintains office supplies.
- Attends workshops and trainings to remain current with relevant laws, rules and regulations.
- Develops and modifies forms and procedures to ensure compliance with changing District, state and federal regulations.
- Compiles, analyzes and maintains data for record maintenance and preparation of various reports.
- Processes Federal Work Study (FWS) paperwork; compiles statistical data; processes changes in student allocations; reviews Federal Work Study payment register and processes "Non-College Work Study" earnings.
- Monitors Federal Work Study program allocation, facilitates Federal Work Study hiring, and reviews monthly timecards.
- Programs and maintains requirements for evaluations in degree audits; maintains certificates and transfer evaluations in college degree audit system.
- Maintains the department’s website by updating published information as required.
- Assists in the reconciliation of financial aid programs and student files.
- Processes correspondence received by department via mail, email, and fax.
- Participates in on-campus and district-wide committees, particularly related to financial aid best practices
- Participates in outreach events to disseminate financial aid information.
- Performs related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- General methods and procedures of recordkeeping.
- Modern office procedures, practices and technology/equipment.
- Modern software applications (Microsoft Office Suite, etc.).
- Financial aid databases and websites used in the course of work, including FAFSA.gov, Central Processing System for Financial Aid Administrators Access, National Student Loan Database, Common Origination and Disbursement, and WebGrants.
- Basic human relation skills, methods, and techniques to conduct interviews, convey technical information, resolve conflicts, and facilitate problem resolution.

Skill/Ability to:

- Support complex financial aid applications through the use of technology and relevant software.
- Provide accurate and complete information to supervisor, students and other financial aid personnel.
- Understand, interpret and apply relevant District, state and federal regulations, procedures and policies related to available loans and grants for students.



FINANCIAL AID ASSISTANT II

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	53	07/01/2017	Classified	3 of 3

- Perform responsibilities with independence and a high level of judgment, often under time pressure.
- Communicate effectively, both orally and in writing.
- Handle sensitive or confidential materials and situations.
- Refer students to other available programs and services.
- Make mathematical calculations accurately.
- Identify and interpret pertinent financial information.
- Adapt to changing regulations.
- Perform a variety of clerical and recordkeeping tasks with accuracy using appropriate technology.
- Serve students, staff and colleagues in a helpful and professional manner.
- 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.

EXPERIENCE AND TRAINING

- Two (2) years of experience performing financial aid or related duties in a community college or state university.

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 upon employment.

Adopted: 07/01/17