



FINANCIAL AID SPECIALIST

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	56	07/01/2017	Classified	1 of 3

DEFINITION

To perform a variety of specialized clerical and technical duties to support the operations of the Financial Aid Department; and to provide accurate and timely information regarding financial aid to students and staff.

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:

- Designs, updates, prints, orders and distributes forms and other materials; establishes and maintains student files and records required by federal regulation.
- 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 to determine eligibility; secures additional information from students as necessary; performs verification of Central Processing System selected files; processes corrections, awards packages and various state and federal grants.
- Oversees the Direct Loan program; reviews eligibility; books and awards loans; exports loans to government systems; reconciles loan expenditures with government system; provides direct loan entrance counseling to students.



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- Advises staff regarding policies and procedures on financial aid matters; interprets applicable regulations and policies.
- Participates in outreach to various community events including Foster Youth, high schools, and on-campus visits to classrooms and clubs.
- Inputs data for the disbursement of checks and for proper accounting of funds.
- Validates information for third party verification.
- Processes financial aid documents.
- Trains, schedules and supervises student assistants and other financial aid staff.
- Prepares time records for management approval.
- Develops appropriate procedures for effective operation consistent with District and granting agency guidelines.
- Processes return of funds, overpayments, unofficial withdrawals and other transactions.
- Reviews more complex financial aid cases such as income adjustments, dependency overrides, homelessness, legal guardianship, and financial fraud cases.
- Compiles and prepares statistical reports as required.
- Processes Federal Work Study paperwork; compiles statistical data; processes changes in student allocations; reviews Federal Work Study payment register and processes "Non-College Work Study" earnings.
- Assists in the year-end closing of financial aid folders.
- 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.).
- Policies, procedures, rules, and regulations of student financial aid programs.
- Basic procedures for maintaining a budget.
- Basic interviewing and training techniques.
- 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.

Skill/Ability to:

- Interpret and apply policies, procedures, rules, and regulations of student financial aid program.
- Maintain budget records and monitor expenditures.
- Develop effective office operating procedures.
- Make mathematical calculations accurately.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.



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- Communicate effectively, both orally and in writing.
- 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

- Three (3) years of experience performing responsible journey-level financial aid duties in a community college or other institution of higher education.

EDUCATION/LICENSE OR CERTIFICATE

- Possession of an Associate degree from an accredited college, 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