



FINANCIAL AID SPECIALIST

DEFINITION

Under general supervision, performs a variety of technical and clerical duties to support the application and enrollment process for the Financial Aid Program and/or Veterans benefits and services; assists students in securing government and private resources to fund their educational needs; provides students with information on the various programs available and the process by which they are awarded; reviews applications for completeness and compliance with required information and supporting documentation; maintains complex files and records; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned supervisory and management personnel. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

This classification provides technical support to the Financial Aid and/or Veterans programs in the intake, examination, review for content and supporting documentation, and submission of completed financial aid applications to higher level staff. Positions at the level exercise judgement and initiative in their assigned tasks, receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF TYPICAL JOB FUNCTIONS

Management reserves the right to make reasonable accommodations so that qualified employees with verified medical conditions can perform the essential functions of the job.

- Provides students with information and documentation related to various financial aid and veterans programs available to them; researches and explains information to students, community agencies, faculty, staff, and the general public on various funding opportunities; specifies guidelines for eligibility, course load, grades, processing timelines, special circumstances, and related criteria.
- Reviews applications for completeness and compliance with contents and supporting documentation required; requests missing or supporting documents as determined by the intake, review, and examination of applications; information may include, but is not limited to, income, educational equivalency completion and family assets.
- Verifies and supports student Federal and State Financial Aid and Veterans applications; extracts, modifies, retrieves, extracts, transmits and maintains financial aid and or VA records; places student information into automated record system and updates hard copy files.
- Assembles and organizes documents and information provided by students and parents; verifies accuracy and consistency of files and application; identifies and resolves discrepancies through follow-up investigations.
- Ensures compliance with applicable regulations, laws, and policies by monitoring eligibility constraints, reviewing processing errors, and identifying discrepancies; within established guidelines, adjusts, corrections and modifications and submits for final verification and award, or revises VA certifications accordingly.
- Reviews and calculates aid payments, including disbursements, overpayments, and amounts owed; reviews ledgers to ensure appropriate disbursement amounts, payout and amount owed to the student

or District; retrieves status on grants, loans, overpayments, financial aid or veterans history and lifetime limits; within established guidelines, initiates corrections to information for income and household changes, dependent support issues and tax credits.

- Notifies students of disqualification, probationary status and/or continued qualification of financial aid or veterans programs based on situations which may occur, such as program changes, grades, units accumulated and student promotion.
- Notifies and assists students in the financial aid and veterans appeal application process for federal and state funding; notifies students of Committee decisions; prepares and transmits correspondence.
- Oversees and trains student workers in appropriate office practices, including providing accurate information, and maintaining confidentiality.
- Reviews and updates Financial Aid and/or Veterans webpage and recorded messages for current and accurate information; reviews and edits Financial Aid verification forms to update in preparation for upcoming school year.
- Attends financial aid/veterans meetings and conferences to maintain current knowledge of administrative changes and professional development and training as required.
- Works productively and cooperatively with others by demonstrating respect, patience, and equitable treatment of all internal and external customers.
- Observes and complies with District and mandated safety rules, regulations, and protocols.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Operations and services of comprehensive financial aid and/or veterans programs.
- Policies and procedures associated with federal, state, and local financial aid and veterans programs including grants and waivers.
- Multiple sources of financial aid and/or veterans funding and their application processes, rules, and regulations.
- Methods and techniques of determining funding program eligibility.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility including those related to confidentiality.
- Methods and techniques of interviewing students and obtaining information necessary for financial aid applications.
- Mathematical skills.
- Principles and business correspondence and routine reports.
- Principles and practices of fiscal record keeping.
- Operational characteristics of multiple databases from funding agencies to ensure data is properly retrieved, entered, and submitted.
- District and mandated safety rules, regulations, and protocols.
- Techniques of providing a high level of customer service by effectively interacting with students, staff, faculty, representatives of outside organizations, and members of the public, including individuals of diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, physical ability, and sexual orientation.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Review and evaluate financial aid and/or veterans applications for completeness and accuracy; determine and resolve deficiencies and discrepancies.
- Understand and apply a diverse range of eligibility and funding criteria from multiple financial aid and veterans resource organizations.
- Perform accurate mathematical calculations and computations.
- Assist students in completing applications and forms.
- Work collaboratively, tactfully, and efficiently with students and families to evaluate and understand their financial aid needs.
- Stay current on changing funding policies, procedures, and requirements.
- Compile information and generate reports.
- Prepare and maintain student and program files.
- Maintain confidentiality of information received in the course of work.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing.
- Demonstrate sensitivity to, and understanding of, the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds of community college students.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

- Equivalent to an associate degree with coursework in finance, accounting, or a related field.

Experience:

- Three (3) years of progressively responsible technical finance and accounting program experience, preferably in an educational environment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.