



Approved by the Board of Trustees on September 12, 2023

FLSA: Non-Exempt

SENIOR FINANCIAL AID SPECIALIST

DEFINITION

Under direction, performs a variety of specialized technical duties related to the Financial Aid Program; processes and awards student financial aid grants and student loans according to mandated policies and procedures; interviews, advises, exercises independent judgment and assists students applying for financial aid; coordinates and communicates support services to disadvantaged populations, including foster/homeless youth, and other at-risk students; serves in a state mandated liaison capacity for communicating program services to students, schools, parents, District departments, community groups and the general public; and performs related duties, as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

This classification in the Financial Aid series is responsible for affirming eligibility, awarding financial aid, and assuming responsibility for coordinating specific aid programs by performing the most complex work assigned to the series. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgment to ensure efficient and effective financial aid program operations. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

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.

- Performs a diverse range of tasks in the verification, award, and ongoing administration of student loans and financial aid services to students; assumes responsibility for advising students on the types of aid available and for administration of assigned programs.
- Evaluates student files and applications for verification and posts individualized/multiple awards; identifies, researches, and resolves conflicting information and discrepancies; utilizes multiple databases and systems to access necessary financial, grades, transcripts, and related data; notates files which need additional information and re-reviews when data becomes available; collaborates with financial aid staff and students for clarification of file contents.
- Makes corrections to Financial Aid applications according to established procedures; updates student records and files; interprets and processes amendments to financial aid using professional judgement regarding Satisfactory Academic Progress (SAP), loss of California Community College Promise Grant (CCCPG) Waiver, Unusual Enrollment History (UEH), dependency overrides and changes in income; transfer monitoring, organizes and oversees the maintenance of required financial aid records and statistics; when assigned to Veterans' Services, submits enrollment certifications to the VA for students using GI Bill benefits; ensures compliance with regulations.

- Verifies applications and determines students' eligibility and financial needs according to clearly established program and/or student loan criteria, mandated guidelines, and District policy.
- Conducts individual interviews with students for the purposes of reviewing application discrepancies and deficiencies, assist with disbursements, priority registration, residency and transcript issues affecting financial aid eligibility, and responding to questions on scholarships, student loans, Federal Work Study Programs, and other related programs and matters.
- Awards funding to eligible students; notifies students of awards or denial of awards; adjusts awards accordingly to prevent an overaward or compliance issue when students present conflicting information, or upon the receipt of scholarships and other outside assistance; prepares emergency loan requests; and, in coordination with supervisor, reviews and makes decisions on student petition and special condition files.
- Examines and processes refund and repayment obligations; resolves issues related to overpayments, keeps programs in compliance to prevent audit findings and participates in the annual audit of student records impacted by these funding issues; generates communications to students; conducts electronic data exchange in multiple sites and databases; and assists with monthly and year-end account reconciliations.
- Serves as a financial aid liaison to coordinates or refer student to resources and services for economically or other disadvantaged or underrepresented students within assigned programs; acts as an advocate to remove barriers impacting student access to matriculation, registration, and financial aid. Interviews students to assess student needs and to explain program eligibility criteria and application processing; determines and certifies continued eligibility for financial aid programs; monitors funds for eligibility prior to disbursement of funds balances submissions for year-end records and submittal to the District's Finance group.
- Provides outreach to local career and District events; provides and presents financial aid information to high school students, staff, counselors and parents; collaborates with high school counselors to increase the number of underrepresented students applying for and receiving financial aid.
- Attends professional financial aid group meetings, trainings, and professional development opportunities to stay current with regulations and requirements.
- Assists with the development and dissemination of financial aid information for students, staff, faculty, and administrators related to changes in State and Federal financial aid programs, regulations, and eligibility criteria; participates in annual admissions and financial aid outreach campaigns in community; incorporates financial aid into new or existing college outreach and early intervention initiatives on campus.
- Oversees and trains student workers in appropriate office practices, including providing accurate information without breaking confidentiality.
- Stays current on changing technologies and federal and state financial aid software programs; import/export financial aid data to update student records, incorporates new developments as appropriate into programs.
- Prepares and maintains a variety of records, files and reports on program activities and operations.
- 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 programs.
- Principles of providing functional direction and training.
- Multiple sources of student aid funding at the local, state, and national level and methods through which they are available.

- Policies and procedures associated with financial aid programs including eligibility requirements and application processes, grants, and waivers.
- A diverse range of student loan options and processing requirements.
- General office and business administration processes.
- Methods and techniques of determining eligibility for a wide variety of programs and services.
- Methods and techniques of interviewing students and obtaining information necessary for financial aid options.
- Mathematical skills.
- District and local programs for at-risk or underprivileged students and methods of accessing them.
- Principles and practices of application quality control.
- Operational characteristics of multiple databases from funding agencies to ensure data is properly retrieved, entered, and submitted.
- 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 balancing program accounts and working with internal and external auditors.
- Principles and practices of business correspondence and routine reports.
- Public speaking skills to disseminate program information to the community.
- Principles and practices of fiscal record keeping.
- 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 and spreadsheet applications relevant to work performed.

Ability to:

- Examine and evaluate applications and award funds to students.
- Interpret and apply rules and regulations from diverse funding sources including student loans, and adjust funding based on same.
- Assist with financial aid program implementation and administration.
- Plan, organize, and coordinate the work of assigned program staff.
- Effectively provide staff leadership and work direction.
- Work effectively with a multi-cultural and diverse student population.
- Evaluate student documentation to determine eligibility for financial aid, and/or program participation.
- Assess student needs and coordinate or refer student to educational and community-based services.
- Serve as a liaison between the program and internal and external organizations and stakeholders.
- Exercise sound interviewing skills when discussing personal and sensitive issues with students.
- Perform accurate mathematical calculations and computations.
- Prepare complete and concise records, reports, and files.
- Stay current on changing funding policies, procedures, and requirements.
- 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:

- Five (5) years of progressively responsible finance and accounting program experience, preferably in an educational environment.

Licenses:

- None.

Certifications:

- Positions assigned to the Veterans' Services program must successfully complete training as a School Certifying Official.

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.