

FINANCIAL AID SPECIALIST

DEFINITION

Under general supervision, performs specialized duties related to the operation of the District's financial aid programs; interviews, advises, and assists students with program services; processes and awards student financial aid according to Federal and State regulations and District policies and procedures; provides information to students and District staff regarding financial aid programs and services; provides assistance for a wide variety of assignments related to the development and implementation of assigned programs, projects, and services

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Director, Financial Aid or designee. May provide technical and functional direction to student workers and assigned staff.

CLASS CHARACTERISTICS

This classification is responsible for coordination of assigned specialized program implementation and outreach tasks in support of Financial Aid programs. The work has technical aspects requiring the interpretation and application of policies, procedures, and regulations and involves frequent contact with students, faculty, and outside organizations. Positions at this level perform the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level 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. This class is distinguished from the Supervisor, Special Programs in that the latter is the full supervisory-level class responsible for organizing, assigning, supervising, and reviewing the work of assigned staff involved in financial aid support services.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Performs the full range of routine to complex specialized duties involved in processing and evaluating application materials and funding of financial aid opportunities to eligible students.
- Verifies initial and continuing eligibility of students who have applied for or been granted financial aid and informs affected students of their status; resolves issues related to overpayments, concurrent enrollment; calculate Return of Title IV Aid, and other financial aid issues for example Satisfactory Academic Progress (SAP) and Pell usage in a timely manner.
- Assists with monthly, quarterly, and year-end reconciliation of financial aid program accounts.
- Verifies financial aid files to ensure accuracy of information provided by parents and students on financial aid applications in conjunction with IRS forms, social security records, and various agencies used to determine financial aid eligibility according to Federal guidelines and forms.
- Analyzes and reviews applications and required documentation to determine financial need and program eligibility for a variety of Federal, State, and District programs.
- Packages financial aid awards using standard needs analysis as defined in Title IV guidelines and in accordance with specific Federal, State, and local guidelines; conducts loan entrance and exit interview sessions with students.
- Authorizes and posts loan amounts to student accounts; makes adjustments as needed; reconciles and refunds disbursements.
- Ensures accurate and timely reporting of student and aid information to lenders, servicers, and guaranty agencies.
- Assists with planning and organizing outreach activities targeting students eligible for special assistance and/or services.

- Assists with outreach financial aid programs, services, and events through various communication venues and social media; develops flyers, brochures, programs, and other outreach materials.
- Conducts workshops and presentations on various topics related to financial aid programs; creates, develops, and revises workshop materials, handouts, and packets.
- Prepares and maintains various programmatic and/or student files and records.
- Gathers, assembles, updates, and distributes a variety of department specific information, forms, records, and data as requested; prepares and maintains a variety of databases and reports.
- Provides information, advice, and counsel to students, parents, and District staff that requires the use of judgment and the interpretation of rules, regulations, policies and procedures; meets with students, parents, and District staff to obtain data, interpret information, and answer questions; prepares correspondence independently to answer questions, request information, or provide explanations.
- Maintains accurate and detailed spreadsheets, files, and records, verifies accuracy of information, researches discrepancies, and records information.
- Researches, compiles, and organizes information and data on topics related to Financial Aid programs; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Attends and participates in program-related District committees, community activities, and professional conferences and meetings concerned with the development and implementation of financial aid programs and/or services.
- Assists with the analysis and reconciliation of student financial aid programs, e.g. disbursements in compliance with Federal, State, and District regulations.
- Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and service delivery needs related to the development and implementation of financial aid programs.
- Procedures for planning, implementing, and maintaining a variety of presentations, activities, and programs.
- Research and reporting methods, techniques, and procedures.
- Principles and practices of data collection and report preparation.
- Applicable Federal, State, local, and District policies, codes, regulations, technical processes, and procedures related to the program to which assigned.
- Modern office practices, methods, and computer equipment and applications, including word processing, database, and spreadsheet applications.
- Record keeping principles and procedures.
- Principles, practices, and techniques of effectively dealing with the public and basic public relations.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, disabilities, socio-economic, and ethnic groups.

Skills & Abilities to:

- Evaluate and provide input to the Director, Financial Aid or designee regarding improvements to existing Financial Aid processes.
- Present Financial Aid information verbally and in writing to various constituent groups such as students, families, Community Based Organizations for example “What is Financial Aid”, “How to

- File for Financial Aid”, “How to Apply for Scholarships.” Prepare materials for outreach presentations, e.g. gathers brochures, reports, and other related program materials.
- Provide sound advice and coaching to students related to financial aid programs and services.
 - Interpret, apply, explain, and ensure compliance with applicable Federal, State, local and District policies, procedures, and regulations.
 - Conduct research; analyze, interpret, summarize, and present technical information and data in an effective manner.
 - Compose and prepare basic reports, correspondence, and other written materials independently or from brief instructions.
 - Make accurate mathematical, financial, and statistical computations.
 - Establish and maintain a variety of filing, record keeping, and tracking systems.
 - Organize own work, set priorities, and meet critical time deadlines.
 - Operate modern office equipment including computer equipment and specialized software applications programs.
 - Use English effectively to communicate in person, over the telephone, and in writing.
 - Understand scope of authority in making independent decisions.
 - Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
 - 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 which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to an Associate’s degree from a regionally accredited college with major coursework in finance, accounting, or a related field and three (3) years of increasingly responsible financial aid experience.

Licenses and Certifications:

- The incumbent may periodically be required to travel to a variety of locations. If operating a vehicle, employees must have the ability to secure and maintain a valid California driver’s license.

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, before groups, and over the telephone. This is primarily a sedentary office classification although standing 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. Incumbents must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

ENVIRONMENTAL ELEMENTS

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