**Position:** Financial Aid Specialist

**Department/Site:** Student Affairs

**FLSA:** Non-Exempt – (Classified CSEA)

**Reports to:** Director, dean, or other administrator in assigned area

**Salary Range:** 31

**DESCRIPTION:**

Under general direction of the Dean of Student Affairs - Enrollment Services or other administrator in assigned area, the Financial Aid Specialist is assigned to the day to day technical duties of the Financial Aid Department including awarding federal and state aid. Financial Aid Specialists have high technical knowledge of financial aid programs and procedures to independently assist students using a variety of mediums.

**DISTINGUISHING CHARACTERISTICS:**

Financial Aid Specialist is the intermediate level classification in the financial aid series. The Financial Aid Specialist performs a variety of responsible, complex, and technical duties relating to the linkage between federal, state, and institutional processes involved in analyzing and verifying application data for processing, tracking, and awarding financial aid funds. The incumbent is typically assigned responsibility for specific completed financial aid functions, and any of the duties contained in the entry level of this classification.

**REPRESENTATIVE DUTIES:**

- Administer federal and state financial aid programs (e.g., Pell Grant, Cal Grant Program) and coordinate with the college’s Business Office and with federal and state reconciliation systems.
- Comply with Title IV federal regulations and state regulations in regards to delivery of funds to students.
- Analyze student data and certify eligibility for program participation as required; interpret apply and explain complex rules, regulations, requirements and restrictions.
- Perform qualitative and quantitative analysis of a variety of documents, including but not limited to: federal tax returns, official academic transcripts, immigration documents, Selective Service correspondence, Social Security documents, court orders, medical transcripts, official birth certificates and promissory notes.
- Verify application information and supporting documentation; recalculate financial need as required; evaluate special circumstances influencing need analysis results and recommend appropriate changes in awards.
- Assess student needs and interests and develop viable plans and alternatives.
• Advise students on relevant financial aid processes and procedures including, but not limited to, Satisfactory Academic Progress appeal procedure, and Dependency Override procedure; provide award letter notifications.
• Advise and counsel students who are in default of their student loans; work with loan servicers, U.S. Department of Education, and other appropriate organizations in order to cure delinquent student loan accounts.
• Plan, organize, and conduct orientations and workshops; deliver oral presentations to students, parents, counselors, and others.
• Audit files and determine students’ continued eligibility for financial aid.
• Coordinate activities with other related on-campus student services; refer students to social service agencies and other community resources as appropriate.
• Research and maintain current knowledge of federal and state regulations and requirements for financial aid and student loan programs to ensure compliance and accurate distribution of information.
• Attend and conduct various meetings; lead and participate in on- and off-campus workshops.
• Monitor grant award process and disbursements; make electronic payments to student accounts and banking agencies.
• Provide technical expertise to other personnel, faculty, students, and the public regarding financial aid programs and services.
• Process BOGW applications according to established procedures.
• Operate a computer and related software to enter and retrieve data; operate calculator, copier, and other standard business machines.
• Analyze both internal and external financial aid reports assessing for accuracy and completeness.
• Compile, prepare and maintain reports, files, records, and correspondence related to financial aid matters, including but not limited to those required by program auditors.
• Assist in training new staff as requested; assist with developing work schedules for student workers as assigned.
• Perform related duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

KNOWLEDGE OF:

• Rules, regulations, procedures, policies and function of federal, state and District financial aid programs
• Financial and statistical record-keeping techniques
• Modern office practices, procedures, and equipment
• College and community resources for students
• Applicable computer operation and software such as word processing, database, and spreadsheet programs
• Correct English grammar, spelling, and punctuation
• District organization, operations, policies and objectives
• Interpersonal skills using tact, patience, and courtesy
• Technical aspects of field of specialty
• Financial and income tax statements
ABILITY TO:

- Interview, advise, and counsel students regarding financial aid programs.
- Understand and be sensitive to those of culturally, socioeconomically, and linguistically diverse backgrounds.
- Exercise reasonable judgment in unusual circumstances.
- Utilize and apply the technology of word processing, database, and spreadsheet applications.
- Learn and apply applicable sections of the state Education Code and other laws, and district organization, operations, policies and objectives.
- Utilize correct English usage, grammar, spelling, punctuation, and vocabulary.
- Prepare and maintain confidential and complex records and files.
- Work independently with limited direction and function effectively within a team setting while demonstrating leadership qualities.
- Interpret, communicate, and apply complex rules, regulations, policies, and procedures effectively.
- Establish and maintain cooperative and effective working relationships with others.
- Keyboard at a level sufficient to meet the needs of the position.
- Make arithmetic calculations quickly and accurately.
- Understand and follow oral and written directions.
- Plan and organize work.
- Analyze situations accurately and adopt an effective course of action.
- Work effectively with frequent interruptions.
- Train and provide work direction to others.
- Understand and implement district operations, policies, and objectives.
- Conduct workshops and presentations for students, parents, and other groups.
- Meet schedules and timelines.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: associate’s degree and four years of increasingly responsible experience in a student services or related program.

LICENSES AND OTHER REQUIREMENTS:

Eligibility to access the National Student Loan Data System.
Some incumbents in this classification may be required to possess a valid CA driver’s license and use of a personal vehicle.

PHYSICAL EFFORT/WORKING ENVIRONMENT:

Office environment; constant interruptions; dexterity of hands and fingers to operate a computer keyboard; sitting for extended periods of time; bending at the waist, kneeling or reaching to retrieve file records.