

DATE: APRIL 2024
FLSA: NON-EXEMPT
SALARY: GRADE J
CBS DESIGNATION: CLASSIFIED BARGAINING UNIT

FINANCIAL AID SPECIALIST

BASIC FUNCTION

Provides specialized support to students who are applying for financial aid; works with students and internal financial aid staff to facilitate student access to education related grants, loans, waivers, and scholarships; accepts, reviews, researches, and processes financial aid requests; verifies and determines the accuracy and validity of financial aid related applications and documents; assists in the grant and loan disbursement process.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned area supervisor. May provide lead direction to temporary staff and/or student workers.

CLASS CHARACTERISTICS

This classification in Financial Aid series is responsible for performing the full range of technical duties by conducting financial aid counseling for students and processing financial aid requests, working independently, and exercising judgment and initiative. Employees 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 department.

EXAMPLES OF TYPICAL JOB FUNCTIONS

1. Accepts, processes, researches, and completes all financial aid requests, including grants and loans, in accordance with federal, state, and institutional regulations; verifies and determines the accuracy and validity of financial aid related documents required for the process; resolves conflicting information issues; and packages up applications for final review, award, and approval by others.
2. Advises and informs a diverse population of students and their families, in person and virtually, on financial assistance programs, options, and responsibilities; explains federal, state, and institutional funding sources and eligibility criteria; assists with the application procedure; explains policies to students, parents and other campus constituents; responds to phone calls, emails, and written requests in a timely and accurate manner.
3. Serves as an initial point of contact for students with special or unusual circumstances; conducts interviews to evaluate the best approach for moving forward with financial aid requests.
4. Provides counseling to students on the manner of integrating their financial concerns relative to personal and/or academic problems in a sensitive, confidential manner.
5. Reviews California College Promise Grant (CCPG) applications and tuition waivers for eligibility to ensure accurate data input and assists with end of year reports to the State; determines eligibility and administers waiver awards; ensures compliance with changing legislation; audits CCPG applications and tuition waivers to ensure data is accurate; maintains spreadsheets and files documents; develops annual applications; updates annual policies and procedures; and verifies veteran eligibility utilizing documents received through the Department of Veterans Affairs.
6. May process and award various special program grants, scholarships, and waivers as assigned; maintains records for financial aid recipients and records data for periodic and/or annual reporting and grant reconciliation; and awards special program funds via various payment types.
7. Educates students on accurate disbursement of funds based on enrollment status and financial aid eligibility; composes and creates informational literature, marketing materials, and communications

to students and sends departmental forms and informational flyers; images and archives documents in scanning database.

8. Assists students with their financial aid preferences, including account creation through disbursement provider; communicates issues and requests to disbursement provider when necessary and advises students on issues regarding their accounts and disbursements.
9. Collaborates with various student services and academic departments; assists with financial aid educational workshops within the District and for various high schools in the District's service area; participates in education and training on financial aid regulations and procedures; keeps abreast of changes in regulations through participation in conferences, workshops, and training seminars.
10. Participates in District-provided in-service training programs.
11. Performs other related duties as assigned; specific duties not listed does not exclude them for this classification if the work is similar or related.

QUALIFICATIONS

Knowledge of:

1. Multiple sources of financial aid and the processes through which they are available.
2. General financial aid intake guidelines.
3. Principles and practices of eligibility determination.
4. Financial aid guidelines and application processes.
5. Methods and techniques of interviewing students and eliciting relevant information.
6. Mathematical principles.
7. Business and office administrative practices and procedures.
8. College registration and matriculation processes and services.
9. Diverse academic, socio-economic, cultural, disability, and ethnic backgrounds of community college students, staff, and the community.
10. Methods and techniques of processing financial aid documents and forms.
11. Methods and techniques of compiling and generating reports.
12. Grant and loan funding principles and practices, including those related to disbursement such as checks and direct deposit.
13. Applicable federal, state, and local laws, rules, regulations, ordinances, and organizational policies and procedures relevant to assigned area of responsibility.
14. Principles and practices of recordkeeping.
15. Methods and techniques of developing program information and materials.

Ability to:

1. Interpret and apply a wide variety of changing federal, state, and institutional policies and procedures.
2. Work tactfully and efficiently with a diverse population of students and their families.
3. Make accurate mathematical computations.
4. Evaluate student documentation to ensure proper and accurate completion.
5. Enter and retrieve data from a computer with sufficient speed and accuracy to perform the work.
6. Be thorough, organized, consistent, and accurate in processing diverse and complex financial aid files.
7. Provide technical support to grant and loan funding processes and recordkeeping.
8. Appropriately answer financial aid questions, maintain confidentiality, and be discreet with student information.
9. Collaborate with various student services and academic departments.
10. Exercise independent judgment within general policy and procedural guidelines.
11. Effectively use computer systems, software applications relevant to work performed, and business

- equipment to perform a variety of work tasks.
12. Communicate effectively in the course of performing work tasks.
 13. Establish, maintain, and foster effective working relationships with those contacted in the course of work.
 14. Demonstrate clear evidence of sensitivity and understanding of the diverse academic, socio-economic, disability, and ethnic backgrounds of students, staff, and the community.
 15. Provide efficient, high-level customer service to the public, vendors, contractors, and District personnel.

Education and Experience:

Completion of the twelfth (12th) grade and two (2) years of increasingly responsible experience supporting a financial aid program in an educational institution; or an equivalent combination of education, training, and/or experience.

Licenses and Certifications:

None.

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 classification primarily works in an office and standing in and walking between work areas is occasionally required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Employees 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 20 pounds.

The essential functions of this classification must be performed by the incumbents with or without reasonable accommodations.

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 individuals in interpreting and enforcing departmental policies and procedures.