<div align="center">**SOUTHWESTERN COMMUNITY COLLEGE DISTRICT**</div>

CLASS TITLE: FINANCIAL AID TECHNICIAN

SUMMARY DESCRIPTION

Under the direction of the Director of Financial Aid, perform a variety of duties related to the completion and processing of applications for financial aid; assist students in completing forms and provide information concerning eligibility requirements and regulations; prepare needs analysis of the programs and make award decisions.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Technician is the journey-level technical classification performing a wide range of program and administrative support duties for the Financial Aid program. Incumbents in this classification provide assistance to students in the completion of financial aid forms, reviewing of forms for accuracy and processing forms upon completion. The Financial Aid Technician is distinguished from the Financial Aid Specialist in that the latter performs analytical duties in the determination and development of financial aid packages to meet student educational needs.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Prepare needs analysis and package of financial aid applicants; establish student budgets and determine program eligibility in accordance with local, state and federal guidelines and regulations. *E*

2. Provide assistance and information in person and on the telephone to students regarding various financial aid programs and services; explain applications, policies, procedures, requirements and restrictions; conduct confidential interviews with students and parents to validate information submitted and to clarify discrepancies; review submitted forms for accuracy and completeness; notify students of additional information needed to process applications; post scholarship awards. *E*

3. Process financial aid applications and forms; review records for changes in status; request transcripts, records and other information as needed. *E*

4. Review and determine eligibility for Emergency Loan applications and route to Fiscal Services office for processing; disburse emergency loan checks; maintain accurate records of different loans disbursed. *E*

5. Participate in the implementation of new document imaging software; compile and present data for financial aid staff; monitor daily application processing. *E*

6. Participate in conducting financial aid orientations, classroom presentations, workshops and outreach activities including presentations at high schools; provide information and assistance to students, parents, instructors and other staff members as required. *E*

7. Operate a computer terminal to obtain or verify financial aid information and records; input a variety of information and data to maintain records and files; process manual warrants. *E*

8. Compile information and data and prepare various statistical and financial reports and forms as required; prepare and type forms, correspondence, requisitions and documents. *E*

9. Maintain current knowledge of regulations and requirements for assigned financial aid and student loan programs; respond to requests for information from District officials, faculty, students and other institutions. *E*

10. Respond to requests from other educational institutions, District officials, faculty and students regarding verification of student status and records; prepare and transmit correspondence for students. *E*

11. Perform a wide variety of duties in support of the financial aid function; research and compile information as required; schedule appointments for students with counselors and other staff. *E*

12. Attend on- and off-campus workshops and conferences as assigned.

13. Perform related duties and responsibilities as required.

KNOWLEDGE AND ABILITIES

Knowledge of:
State and federal regulations and guidelines concerning financial aid eligibility.
Financial aid Income Tax Statements.
Interviewing methods and techniques.
Technical aspects of field of specialty.
Financial and statistical record-keeping techniques.
District operations, policies and objectives.
Applicable sections of the State Education Code and other applicable laws.
Telephone techniques and etiquette.
Mathematical principles.
Office procedures, methods and equipment including computers and applicable software applications such as word processing, spreadsheets and databases.
Interpersonal skills using tact, patience and courtesy.
Correct English usage, grammar, spelling, punctuation and vocabulary.
Oral and written communication skills.

Ability to:
Perform clerical duties in a financial aid office at a community college.
Learn to interpret and explain laws, rules, regulations and policies regarding financial aid programs.
Operate office equipment including computers and supporting word processing, spreadsheet and database applications.
Work independently with little direction.
Understand and follow oral and written instructions.
Meet schedules and time lines.
Prepare and maintain financial and statistical records and reports.
Work effectively with frequent interruptions.
Work with and exhibit sensitivity to and understanding of the diverse racial, ethnic, disabled, sexual orientation, and cultural populations of community college students.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.

EDUCATION AND EXPERIENCE

Any combination equivalent to: completion of the twelfth grade supplemented by college level course work in education, counseling or a related field and two years of increasingly responsible experience in a student services area involving frequent student contact.

LICENSE OR CERTIFICATE

Valid California driver's license and a safe driving record.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting with frequent interruptions and distractions; extended periods of time viewing computer monitor; possible exposure to dissatisfied individuals.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

Vision: See in the normal visual range with or without correction.

Hearing: Hear in the normal audio range with or without correction.

Created: March, 1995
Ewing & Company
Revised: January, 2007
Johnson & Associates