

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT

CLASS TITLE: FINANCIAL AID SPECIALIST

SUMMARY DESCRIPTION

Under the direction of the Director of Financial Aid, provide specialized assistance and information to applicants regarding the Financial Aid program; prepare and review needs analysis and packaging of Financial Aid applications; coordinate the activities of the programs and make award decisions.

DISTINGUISHING CHARACTERISTICS

This is the full journey level professional class within the Financial Aid Specialist series. Employees within this class are distinguished from the Senior Financial Aid Specialist by the performance of routine financial aid processing functions. Incumbents in this classification are further distinguished from the Senior level in that that latter assumes lead supervision over and provides work direction to lower level financial aid staff, coordinates financial aid program activities, makes award decisions and coordinates the implementation of new financial aid software or system functions. Incumbents at the journey 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.

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; interpret and apply government and campus policies to determine appropriate award allocation for each applicant; establish student budgets and determine program eligibility; ensure compliance with state and Federal guidelines. ***E***
2. Assist in the coordination of assigned state and Federal financial aid programs; monitor and request annual funding for assigned program to assure adequate funds are available for projected student awards; coordinate disbursement of funds with fiscal services staff to accurately disburse aid to eligible students in a timely fashion. ***E***
3. Advise and counsel student applicants and recipients in all phases of financial aid; interview students and assess individual academic, financial and personal situations; determine impact of needs analysis; explain program regulations, requirements and institutional policies; assure accuracy and completeness of applications. ***E***
4. Monitor and maintain the automated process to calculate satisfactory academic progress; review student educational plans; audit files to determine students' continued eligibility for financial aid. ***E***
5. Reconcile financial aid overpayments; research, compile and generate necessary data and required documentation and reports; determine amount owed by student; assist in implementing collection procedures and practices; explain overpayments, causes and ramifications and provide assistance for resolutions. ***E***
6. Import and export student data to state program agencies; upload and download awards, grade point averages and other data as required; generate required reports. ***E***
7. Participate in various college wide outreach functions; provide technical expertise to other personnel, faculty, students and the public regarding financial aid processes; coordinate activities

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with other related on-campus student services; refer students to social service agencies and other community resources as appropriate. *E*

8. Maintain external contacts with government agencies and other community colleges for the purpose of coordinating, obtaining and verifying information. *E*
9. Maintain current knowledge of complex regulations and requirements for assigned financial aid and student loan programs; attend and conduct various meetings; participate in on- and off-campus workshops. *E*
10. Initiate and compose correspondence as appropriate; type memoranda and a wide variety of materials; make and post signs to advise students and staff of special deadlines, requirements and events. *E*
11. Assist in training new staff regarding processes and procedures of assigned programs; assist with developing work schedules for student workers as assigned.
12. Perform related duties and responsibilities as required.

KNOWLEDGE AND ABILITIES

Knowledge of:

Federal and state Student Financial Assistance programs including policies, rules and regulations.

Interviewing and advising techniques.

Recruitment techniques and methods.

Public speaking methods.

District organization, operations, policies and objectives.

Technical aspects of field of specialty.

Financial and income tax statements.

Methods and terminology of financial record keeping.

Principles and practices of record keeping.

Methods and techniques of comprehensive and technical report preparation.

Office procedures, methods and equipment including computers and applicable software applications such as word processing, spreadsheets and databases.

Oral and written communications skills.

Interpersonal skills using tact, patience and courtesy.

Ability to:

Interpret and communicate complex rules, regulations, policies and procedures effectively.

Advise, counsel and interview students from diverse ethnic and socio-economic backgrounds.

Analyze situations accurately and adopt an effective course of action.

Maintain accurate and complete records and prepare comprehensive and technical reports.

Operate office equipment including computers and supporting word processing, spreadsheet and database applications.

Understand and follow oral and written directions.

Plan and organize work.

Meet schedules and time lines.

Work independently with little direction.

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.

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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: two years of college with major coursework in education, counseling or a related field and two years of increasingly responsible experience in a student services or related program.

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; exposure to dissatisfied individuals; 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