



## Job Description

**JOB TITLE:** FINANCIAL AID TECHNICIAN

**PAY GRADE:** CL 18

**LAST REVISED:** 06/01/07

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job. Additional or different duties from the ones set forth below may be required to address changing business needs/practices.*

### **SUMMARY DESCRIPTION**

Under general supervision of assigned manager, performs a variety of specialized and technical duties in support of financial aid programs and services; receives, reviews, and validates financial aid applications, performs needs analysis, and determines eligibility and awards in accordance with District policies and procedures and federal, state, and local requirements; and monitors and reconciles Federal Work Student program expenditures.

### **DISTINGUISHING CHARACTERISTICS**

The Financial Aid Technician is a technical level 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. Reviews applications and supporting documentations for discrepancies or conflict of data elements between application and supporting documents including Department of Homeland Security (DHS), Social Security Administration (SSA), Selective Service, IRS forms, judicial court documentation, and Veterans Administration documents; resolves data element conflicts/discrepancies; checks academic and financial aid historical records for probations or termination status; analyzes data submitted by applicants/parents and compares/contrasts information provided on various federal tax forms and other document; finalizes corrected data elements and sets record clearance for packaging.
2. Processes applications and verification forms; determines student eligibility for federal and/or state grants, loans, the Federal Work Study (FWS) program and Board of Governor's Fee Waiver (BOGW) program using federal methodology, need analysis, and state-defined income criteria; establishes initial cost of attendance for each student data record received from grant funding agencies; applies federal methodology to calculate student's financial need; identifies unusual circumstances for possible alternative processing; requests and analyzes records and other information needed to determine status of application and forms; researches and resolves problems.
3. Performs a variety of technical duties in support of the program; provides technical assistance and information to students, parents, and staff regarding financial aid programs and services as well as various benefits and their applicability to individual situations; instructs students in proper completion of forms and applications; explains application requirements and restrictions; notifies ineligible applicants; explores and resolves conflicts or mitigating circumstances; maintains records; conducts

## Job Description

financial aid workshops and classroom presentations.

4. Participates in mid-term transfer activities; informs NSLDS regarding mid-year transfers for Title IV aid; develops and maintains reports to identify mid-year transfers; accesses "alerts" sent to schools by NSLDS; monitors changes in student eligibility of Title IV aid; identifies new information generated by NSLDS Alert Program regarding new loads, disbursements, and changes in outstanding principal balance of loan; analyzes relevant information that could affect student eligibility and disbursement for Pell Grant and Title IV loans.
5. Coordinates student employment programs including District Student Help, Federal Work Study (FWS), CalWorks Work Study (CWWS), International Student Employees, Community Service, American Reads, and other programs; coordinates with other staff to assure compliance with state and federal laws pertaining to student employment; collects job descriptions and posts and maintains job listing board and Internet site; monitors enrollment status and satisfactory academic performance of student employees; collects forms and supporting documentations required for compliance with various regulations; creates and maintains Supervisors Manual and Student Employee Handbook; ensures compliance with various rules and regulations.
6. Plans and coordinates scholarship Honors Program event; creates, orders, and sends out invitations; develops program brochure; orders food/drink for event; orders plaques; designs/prints certificates.
7. Participates in fund management for assigned programs; coordinates award activities; maintains records of awards; posts data; monitors entitlements and earnings; provides periodic reports; performs fund expenditure projections; monitors year to date spending; coordinates with other offices regarding disbursement of fund programs and student holds to outstanding college debt; prepares check disbursement reports; disburses loan checks.
8. Participates in a full range of reporting duties; assists in compiling, analyzing, and maintaining data for the maintenance of various records and the preparation of various reports; identifies required data elements to create database queries; creates selection sets; coordinates with other staff to obtain data; researches error reports and makes adjustments.
9. Performs a full range of clerical and administrative duties in support of program operations; relieves manager of administrative details including to research and resolve problems; troubleshoots computer information processing system problems; assembles files and duplicates materials; composes and prepares office correspondence, materials, reports, forms, brochures, presentations, handbooks, manuals, and consumer information; answers phones, refers callers, and takes messages; maintains and orders supplies; oversees work of student workers in the office.
10. Maintains current knowledge and learn new state and federal laws, rules, and regulations pertaining to financial aid; reviews updated or new technical instructions or references; attends seminars, conferences, workshops, and other training sessions; participates in the development of new/revised procedures to accommodate changes; assists in providing training and direction to others regarding changes and new regulations including to create and disseminate new instructions.
11. May train and provide work direction to assigned student workers and temporary help as assigned.
12. Performs related duties as required.

**QUALIFICATIONS** - *The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

**Knowledge of:**

Student financial aid processes and procedures including applicable federal and state laws and regulations regarding student grants and loans.

## Job Description

General accounting and bookkeeping practices and techniques.  
State and federal tax returns, schedules, and attachments.  
Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.  
Mathematical principles and practices.  
English usage, spelling, grammar and punctuation.  
Principles and procedures of record keeping and filing.  
Principles of business letter writing and basic report preparation.  
Supervisory principles.  
Methods and techniques of conflict resolution.  
Pertinent federal, state, and local laws, codes, and regulations including state and federal labor law as it applies to the employment of students and DHS employment requirements and documentation.

### **Ability to:**

Provide a variety of technical support to District's financial aid programs and functions.  
Learn and understand student financial aid laws, regulations, policies, processes and procedures.  
Learn specialized student financial aid computer software packages/applications in a client/server environment.  
Learn needs analysis methodology.  
Function as a technical expert in assigned areas of financial aid and student employment processing.  
Perform arithmetic calculations of average to above average difficulty.  
Make oral presentations to groups.  
Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.  
Adapt to changing technologies and learn functionality of new equipment and systems.  
Type or enter data at a speed necessary for successful job performance.  
Maintain close attention to detail.  
Properly handle difficult, sensitive, and confidential situations and materials.  
Plan, organize and prioritize work in order to meet schedules and timelines.  
Maintain current, accurate and confidential records and files.  
Prepare a variety of comprehensive and statistical reports.  
Independently prepare routine correspondence and memoranda.  
Work independently and collaboratively.  
Supervise student and/or other temporary help.  
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 Guidelines** - *Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. Examples of ways to obtain the knowledge and abilities would be:*

### **Education/Training:**

Equivalent to completion of the twelfth grade supplemented by college level course work in business administration, accounting, or a related field.

### **Experience:**

Two years of increasingly responsible clerical and program support experience preferably in an educational or accounting office.

### **License or Certificate:**

Ability to obtain specialized certifications as required.



## Job Description

**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.

**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 walk, 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; vision sufficient to read computer screens and printed documents; and to operate assigned equipment.

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

*Johnson & Associates*

Revised: June, 2007