

JOB TITLE: FINANCIAL AID OUTREACH TECHNICIAN

PAY GRADE: CL 18

LAST REVISED: 08/18/15

*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; provide students, staff and the public with financial aid information and processing assistance; 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. The Financial Aid Outreach Technician is a technical level classification performing a wide range of program and administrative support duties for the Financial Aid program to support low-income students.

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. Serves as point of contact for students, prospective students, staff, and the general public regarding financial aid services; provides technical information and assistance; explains program applications, policies, procedures, requirements, and restrictions; develops promotional and informational materials for distribution on and off campus; maintains assigned resource material.
2. Verifies and reviews financial aid materials, applications e.g.: Free Application for Financial Aid (FAFSA) student records, files and reports for completeness and conformance with established regulations and procedures.
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 financial aid workshops and classroom presentations.
4. Plans, organizes, schedules, and conducts orientations, workshops, seminars, class presentations, tours, meetings, and other activities on and off campus to raise awareness about financial aid; arranges and confirms speakers; reserves facilities and makes other necessary arrangements.
5. 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.

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6. 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.
7. 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.
8. 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.
9. 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.
10. 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.
11. 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.
12. Compiles and tabulates data from various sources and prepares appropriate forms, schedules, and reports; lists, abstracts, or summarizes data; inputs and reviews data and prepares special and periodic reports related to assigned project and/or program area including state and federally mandated reports; verifies accuracy, completeness, and compliance to rules, procedures, regulations, policies, and other mandates
13. Establishes and maintains records including student records; maintains complex, interrelated filing systems that may include confidential files; collects, compiles, and records narrative, statistical, and financial data and other information; researches and verifies information as requested.
14. Develops individualized financial aid service plans to meet institutional and low income student needs; schedules appointments for on- and off-campus meetings, conferences, and workshops.
15. May train and provide work direction to assigned student workers and temporary help as assigned.

16. 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.

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:

Understand the organization and operation of the assigned office and/or program area as necessary to assume assigned responsibilities.

Understand, apply, and ensure compliance with administrative and office policies and procedures as well as pertinent laws, regulations, and ordinances.

Perform a range of technical, program support, administrative, and clerical duties involving the use of independent judgment and personal initiative.

Coordinate and conduct workshops, seminars, special event, class presentations, orientations, and tours.

Provide specialized assistance, training, and information to students, faculty, administrators, staff, and the public concerning assigned program area, functions, and resources.

Orient students, staff, and public to resources and services related to area of assignment.

Research, compile, analyze, and interpret data.

Independently compose and prepare routine correspondence and memoranda.

Prepare a variety of clear and concise administrative and financial records.

Implement and maintain filing systems.

Compile information and write reports, business correspondence, and procedure manuals using correct English usage, grammar, spelling, punctuation and vocabulary.

Respond to requests and inquiries from students, staff, or the public; effectively present technical information in person or on the telephone to students, staff, or the public.

Screen, interview, and assess needs of students and clients.

Use sound judgment in recognizing scope of authority.

Exercise good judgment and discretion in analyzing and resolving confidential, difficult, and sensitive situations.

Type or enter data at a speed necessary for successful job performance.

Train and provide work direction to others.

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Plan and organize work to meet schedules and changing deadlines.
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.
Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
Work effectively with minimal supervision.
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.

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.