



## Job Description

**JOB TITLE:** FINANCIAL AID SPECIALIST

**PAY GRADE:** CL 20

**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 direction of assigned manager, administers federal, state, and District financial aid program funds; maintains accountability for financial aid funding; provides program accountability for all sources of financial aid including to represent the office during audits; serves as a technical expert regarding area of assignment; and relieves assigned manager of a variety of administrative details including to serve as lead over office staff and activities.

### **DISTINGUISHING CHARACTERISTICS**

The Financial Aid Specialist is a paraprofessional classification performing a wide range of analytical duties for the Financial Aid program. This classification is distinguished from the Financial Aid Technician by assuming responsibility for making financial aid award decisions 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. Ensures that timelines are met for District, state, and federal requirements relating to the duties of the Financial Aid Office.
2. Performs a variety of duties related to funds eligibility and disbursement; analyzes applications and verifies eligibility in compliance with applicable local, state, and federal regulations and guidelines; verifies that all preliminary work done on student files is correct and meets all regulations; generates student financial aid packages; monitors attendance and academic progress of all students who have accepted federal and state financial aid; using a variety of tools, corrects amounts, returns checks, and requests stop payment/reissue of checks to ensure students receive the amounts they are eligible for; accounts for proper expenditures of financial aid funds; coordinates with Business Services Office to resolve problems; prepares various reports.
3. Determines and assigns each student a budget and cost of attendance; makes adjustments as necessary; calculates student's financial need figure and sets actual family contribution; determines and assigns packaging group; determines which funds the student is eligible for; determines each student's Federal Workstudy eligibility; sets-up packaging parameters for Federal Supplemental Educational Opportunity Grant; determines eligibility for various grants/programs; makes initial determination of subsidized/unsubsidized loan eligibility; oversees the preparation of award letters.
4. Participates in the Financial Aid Advisory Committee (FAAC); gathers information from students to justify special petitions for the FAAC; processes files appropriately after petition determination.
5. Plans, organizes, and directs the District's Scholarship Program; compiles and publishes booklet and applications; advertises and disburses information about the program; develops and oversees on-

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campus scholarship bulletin board postings; oversees evaluation of scholarship applications to determine eligibility; establishes committee to read and score applications; provides support to the scholarship committee; notifies scholarship winners; notifies scholarship donor and request funds be sent to the District; directs the release of scholarship checks.

6. Performs a variety of funds management and reconciliation duties; ensures that proper procedures/policies/rules/regulations are applied to all federal/state programs; analyzes and calculates financial aid funding needed from various federal and state programs; monitors federal and state accounts to ensure that financial aid monies are accurately drawn and deposited into correct District accounts; coordinates with internal and external auditors to guarantee program fund accountability and integrity; completes federal payment documents; oversees and verifies federal and state grant and loan accounts; monitors federal authorization of funding; monitors status of program fund account ledgers with District's Business Services staff and the Placer County Office of Education accounting systems; monitors repayments; balances fund accounts; reconciles assigned accounts.
7. Performs a variety of research and reporting duties; gathers, interprets, and analyzes a variety of data; completes and prepares a variety of records and reports; develops and creates reconciled data files in order for information to be transmitted to other agencies; gathers data and information to complete surveys and reports including those for other agencies and institutions.
8. Participates in the development/design of financial aid software reporting tools; establishes and maintains financial aid processing rules within the software; installs network software and updates; modifies and inputs data elements to comply with regulatory changes; coordinates with representatives from state and federal agencies to troubleshoot problems with specialized software and data base integrity; designs reports to provide information to applicable agencies.
9. Performs a variety of customer service and marketing duties; serves as point of contact with students regarding office services; represents the District at activities with local area high schools and other external agencies/organizations; interacts with other District organizational units to provide students with a comprehensive financial aid package; conducts financial aid workshops; explains programs to students and assist them with completing applications; coordinates award activities with internal and external contacts.
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; 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.
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. Trains and provides work direction to assigned student workers and temporary help as assigned.
13. 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:**

In-depth knowledge of state and federal student financial aid processes and procedures including federal and state laws and regulations regarding the various duties of the Financial Aid Office.

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Human relations skills, methods, and techniques to conduct interviews, convey technical information, resolve conflicts, and to facilitate problem resolution.  
General accounting and bookkeeping practices and techniques used in ledger recordkeeping.  
State and federal tax returns, schedules, and attachments.  
Needs analysis methodology.  
Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.  
Financial aid management systems and a variety of specialized off-campus software applications.  
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.  
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.  
Supervisory principles.

### **Ability to:**

Provides a full range of specialized support to District's financial aid programs and functions.  
Function as a technical expert in assigned areas of financial aid processing.  
Learn and understand in-depth student financial aid processes and procedures including laws, regulations, and District policies and procedures.  
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 including financial records.  
Conduct technical research and 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 technical and program support experience in a financial aid office comparable to a Financial Aid Technician with Sierra College.



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### **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.

*Johnson & Associates*  
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