

JOB TITLE: Financial Aid Outreach Technician
PAY GRADE: CL 18
LAST REVISED: July 2025

*Job Descriptions/Class Specifications are intended to present a descriptive list of the range of duties performed by employees in the job and are **not** intended to reflect all duties performed within the job.*

Sierra College has a strong commitment to the achievement of equity and inclusion among its faculty, staff, and students and values the rich, diverse backgrounds that make up the campus community. A strong candidate for this position must have the understanding and ability to successfully support individuals with varying backgrounds. This includes persons with disabilities, various gender identities and sexual orientations, as well as individuals from historically underrepresented communities and other groups. Our District is committed to providing strategies for success and proactive student-centered practices and policies focused on eliminating equity gaps to ensure the District provides an inclusive educational and employment environment focused on strategies for success and equitable outcomes for all.

SUMMARY DESCRIPTION

Under general supervision from assigned manager, performs specialized and technical duties in support of financial aid programs and services; participates in the planning, development, organization, coordination, and implementation of enrollment and retention programs; provides students, District staff, and the public with financial aid information and processing assistance; receives, reviews, and validates financial aid applications; and performs needs analysis, and determines eligibility and awards in accordance with District policies and procedures and federal, state, and local requirements.

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, parents, District staff, and the public regarding financial aid programs, services, benefits, and their applicability to individual situations; provides technical information and practical assistance with completing financial aid and scholarship applications and forms; provides information and referrals on college programs and procedures; provides information on program applications, policies, procedures, requirements, and restrictions; notifies ineligible applicants; explores and resolves conflicts or mitigating circumstances; develops and maintains enrollment, recruitment, promotional and informational materials and resources; assists in the development and coordination of user-friendly applications, registration, and student services materials; utilizes and communicates in Client Assistance Program (CAP), outreach and promise help center in boxes and chat, emails, and financial aid chat bot.
2. Connects with Promise High School students, support programs, and counselors regarding Financial Aid trainings and presentations; assists in coordinating enrollment efforts; develops and implements appropriate methods and procedures to optimize efficient and effective delivery of enrollment and financial aid outreach services to potential students; collaborates with counselors, provides enrollment and financial aid assistance to students in a high school and college setting, including application workshops, financial aid next steps, and verification support.
3. Verifies and reviews financial aid materials and applications for completeness and conformance, including Free Application for Federal Student Aid (FAFSA) and California Dream Act (CADAA) student records, files, and reports.
4. Participates in reporting duties; assists in gathering, compiling, auditing, maintaining, and analyzing data for the maintenance and preparation of records and reports; identifies required data elements to create database queries; creates selection sets; coordinates with District staff to obtain data; identifies error reports and makes adjustments; develops, manages, and maintains databases and utilizes data to support efforts; tracks student contact to monitor services and enrollment support; collects and analyzes statistical, demographic, and other data for recruitment purposes; generates reports to ensure District equity goals are met.

5. Performs clerical and administrative duties in support of program operations researches and resolves 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; maintains and updates interrelated filing systems that include vital documentation in relation to students' eligibility inclusive of confidential records and financial data; contributes to the development and maintenance of the master Enrollment Services calendar; adds Financial Aid related events to Outreach calendar, department calendar, and the District website event calendar.
6. Plans, organizes, schedules, and conducts orientations, workshops, seminars, presentations, tours, meetings, and other activities on and off campus; assists in the planning and coordination of college nights and high school counseling events; prepares event information materials; recruits District staff event volunteers; arranges and confirms speakers; reserves facilities and makes other necessary arrangements, as needed; provides virtual tour support; provides visual and media support for District software and recorded webinars for the District YouTube channel.
7. Reviews applications and supporting documents for discrepancies or conflict of data elements between application and supporting documents; requests and reviews records and information from federal, state, and judicial organizations; resolves data element conflicts and discrepancies; checks academic and financial aid historical records for probation or termination status; analyzes data submitted by applicants and parents and compares and contrasts information provided on federal tax forms and other documents; finalizes corrected data elements and sets record clearance for packaging.
8. Processes applications and verification forms; determines student eligibility for federal and/or state grants, loans, the Federal Work Study (FWS) program and California College Promise Grant (CCPG) programs using federal methodology, needs analysis, and state-defined income criteria; establishes initial cost of attendance for each student; identifies circumstances for possible alternative processing; requests and analyzes records and information needed to determine status of application and forms; researches and resolves problems; develops individualized financial aid service plans to meet institutional and low-income student need.
9. Reviews updated or new technical instructions or references; participates in the development of new and revised procedures to accommodate changes; assists in providing training and direction regarding changes and new regulations.
10. Participates in mid-term transfer activities, including updating and maintaining reports; informs National Student Loan Data System (NSLDS) regarding mid-year transfers for Title IV aid; 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.
11. Participates in fund management for assigned programs; coordinates and maintains award activities, data, and records; monitors entitlements and earnings; provides periodic reports; performs fund expenditure projections; monitors year to date spending; coordinates with other departments regarding disbursement of fund programs and student holds to outstanding college debt; prepares check disbursement reports; disburses loan checks.
12. Serves as liaison with District staff regarding marketing and advertising, student services, financial aid, complaint resolution, and other related program issues.
13. Works with outreach staff in the coordination of enrollment services efforts; prioritizes, coordinates, and oversees Financial Aid Outreach activities to meet timelines.
14. Compiles and maintains 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 or program area, including mandated reports; verifies accuracy, completeness, and compliance to rules, procedures, regulations, policies, and other mandates.
15. Provides onboarding support, general work training, guidance, supervision assistance, and directs activities of students or temporary employees.
16. Performs related duties that support the overall objective of the position.

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 standard and emergency grants and funds, programs, and Federal Direct subsidized or unsubsidized loans and plus loans.
- Sierra College and operations of the Financial Aid Department and other student service departments.
- U.S. Department of Education verification requirements.
- Federal and State tax returns, schedules, and attachments.
- Principles and procedures used in community college enrollment and student support programs and services.
- Student recruitment and retention strategies and techniques.
- Federal, state, and local laws, codes, and regulations regarding financial aid and the support of students, including, but not limited to, the Family Educational Rights and Privacy Act (FERPA), the Americans with Disabilities Act (ADA), Return to Title IV, and applicable laws governing student employment.
- Principles and practices of public information and speaking, community relations, and marketing.
- Needs analysis methodology.
- General accounting and bookkeeping practices and techniques.
- Moderate to complex mathematical concepts.
- English usage, grammar, spelling, punctuation, and vocabulary, including proofreading, copy writing, editing, and formatting techniques.

Ability to:

- Provide assistance, training, and information to students, District staff, and the public concerning financial aid programs, services, functions, and resources.
- Function as a technical expert in assigned areas of financial aid and student employment processing.
- Access federal, state, and local sites to report information and retrieve data, and compile reports and transactions, including sensitive personal and monetary transactions.
- Execute and review financial aid and other student loan applications, including the Free Application for Federal Student Aid (FAFSA) and California Dream Act (CADAA).
- Assist in developing, implementing, and evaluating public relations and marketing goals, objectives, policies, and procedures related to financial aid outreach.
- Coordinate and conduct workshops, seminars, special events, presentations, orientations, and tours.
- Prepare comprehensive and statistical reports.
- Properly handle difficult, sensitive, and confidential situations and materials.
- Use sound judgment in recognizing scope of authority.
- Adapt to changing technologies and learn functionality of new equipment and systems.
- Plan and organize work to meet changing priorities and deadlines.
- Maintain a high level of attention to detail.
- Maintain current, accurate, and confidential records and files.
- Utilize office procedures, methods, and equipment, including computers, technology, and applicable software applications sufficiently to perform the duties of the classification, including financial aid management and student support systems, the District's Banner Enterprise Resource Planning (ERP) system, and intermediate Microsoft Office skills.
- Maintain confidentiality of information.
- Perform arithmetic calculations of average to above-average difficulty.
- Follow oral and written directions.

- Communicate clearly and concisely, both orally and in writing.
- Provide onboarding support, general work training, guidance, supervision assistance, and direct activities of students or temporary employees.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work independently and collaboratively.
- Apply District policies and procedures.

EDUCATION AND EXPERIENCE GUIDELINES

Any combination of education and experience that demonstrates the required above knowledge and abilities is qualifying. Examples of ways to obtain the above knowledge and abilities could include, but are not limited to, the following:

Education/Training

- Equivalent to completion of the twelfth grade or General Educational Development (GED) 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 or a related field.

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. Position may be required to work evenings, nights, and weekends.

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.

Board Approved: July 15, 2025