

JOB TITLE: Financial Aid 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 programmatic, technical, and administrative duties in support of financial aid programs and services; receives, reviews, validates, and analyzes financial aid applications; performs needs analysis and determines eligibility and awards in accordance with District policies and procedures and federal, state, and local requirements; assists students in the completion of student financial aid forms, analysis of tax information, and Satisfactory Academic Progress (SAP) calculations; and monitors and reconciles Federal Work Student program expenditures.

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 and processes applications and verification forms; determines student eligibility for federal and state grants, loans, and Federal Work Study (FWS) 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 alternative processing; requests and reviews records and information from federal, state, and judicial organizations; verifies information required by the U.S. Department of Education; identifies, confirms, and adjusts federal, state, and other data to resolve discrepancies or conflicts of parental or student data between applications and supporting documents; finalizes corrected data elements and sets record clearance for financial aid packaging.
2. Verifies and reviews financial aid materials and applications for completeness and compliance, including Free Application for Federal Student Aid (FAFSA) and California Dream Act (CADAA) student records, files, and reports.
3. Maintains adherence to federal and state regulations while completing a variety of Professional Judgment Appeals, including, but not limited to, dependency override, Expected Family Contribution (EFC) appeals, cost of attendance adjustments and Satisfactory Academic Progress (SAP) appeals.
4. Serves and participates on the Financial Aid Advisory Committee (FAAC); conducts research and analysis of documentation to calculate adjustments to determine student eligibility; processes Professional Judgement files; recognizes and maintains readiness for situations requiring Title IX reporting, as these petitions may require intervention.
5. Participates in fund management for assigned programs; coordinates and maintains award records, data, and activities; monitors entitlements and earnings; provides periodic reports; performs fund expenditure projections; monitors year to date spending; coordinates with other department regarding disbursement of fund programs and student holds to outstanding college debt.
6. Processes student employment requests for District Student Help (DSH), Federal Work Study (FWS), CalWorks Work Study (CWWS), International Student Employees, Community Service, America Reads, and other programs; processes and maintains awards for FWS and CWWS; runs reports to ensure continued eligibility of FWS funds; assists in mandatory annual federal work study reporting;

partners with Human Resources to ensure compliance with federal and state employment laws; collects student employment job descriptions; posts and maintains job listing board and department website; monitors enrollment status and SAP of student employees; collects forms and verifies authenticity of supporting documents required for compliance; updates and maintains Supervisor Manual and Student Employee Handbook; ensures compliance with rules and regulations.

7. Verifies eligibility and post awards for special student support programs, including, but not limited to, Extended Opportunity Programs (EOPS), Next Up, and Chafee; maintains resource postings for special programs, including, but not limited to, Puente and Umoja programs; coordinates efforts with special populations staff to ensure financial aid benefits are delivered efficiently and effectively to students; posts book vouchers and awards, corrects aid amounts for special programs, confirms budgets, and processes special circumstances for unmet need issues for students to continue to receive grants or federal aid.
8. Facilitates financial aid processes to ensure compliance with federal, state, and institutional laws, regulations, and policies; ensures award amounts are correct each semester and award notifications are sent out on disbursement days; corrects award notifications, as needed; posts Veterans Waivers and uploads information to District tracking systems; maintains accurate case management and intercommunications by logging summary of actions taken on each file and correspondence with students; assists in the preparation of annual audit or program review.
9. Serves as a point of contact to students, parents, District staff, and the public; provides technical information and subject matter expertise regarding financial aid programs, services, 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; assists in coordinating and participates in outreach events; composes and presents informational materials on the various financial aid types and how to acquire and retain financial aid funds; promotes realistic expectations for students related to California College Promise Grant (CCPG) tuition waivers, Pell Grants, loans, and scholarships.
10. Checks and confirms homeless eligibility with director or designee of a Housing and Urban Development (HUD) funded shelter, Runaway and Homeless Youth Act (RHYA) funded shelter, transitional living program, or other administrator; awards California College Promise Grant (CCPG) and priority registration for homeless students; complies with California Community College Chancellor's Office (CCCCO) mandates to prepare and submit required data or reports related to homeless Management Information Systems (MIS) data.
11. Performs and monitors data imports of Federal Institutional Student Information Report (ISIR) data; ensures comment codes with default or overpayments are present and comment codes selected by students are reflected for verification.
12. Monitors Pell Grant files from the US Department of Education of Federal ISIRs selected for verification; reviews and verifies student disbursement documents and communicates with department staff to confirm overpayments and requests notification letter be provided to student; provides student with next steps to complete verification within established timeframes.
13. 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; schedules and manages appointments; 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.
14. Reviews updated or new technical instructions or references; participates in the development of new or revised procedures to accommodate changes; assists in providing training and direction regarding changes and new regulations.
15. 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; researches and adjusts error reports.

16. Performs Return to Title IV processes; pulls baseline reports; analyzes information to determine correct date of withdraw; calculates institutional charges and portions of a student's unearned aid and amount to be returned to the funding source.
17. 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 and 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 loans; analyzes relevant information that could affect student eligibility and disbursement for Pell Grant and Title IV loans.
18. Works to mitigate potential fraud by looking for inconsistencies in reported information and verifying the identity of students flagged by the U.S. Department of Education or Sierra College; enters identity findings in national databases, including Financial Aid Administrators (FAA) Access; assists manager with compiling documentation to support investigations by the Office of Inspector General.
19. Provides onboarding support, general work training, guidance, supervision assistance, and directs activities of students or temporary employees.
20. 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 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.
- 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.
- 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).
- Make presentations to groups.
- 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