JOB TITLE: Senior Financial Aid Specialist

PAY GRADE: CL 22

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 analytical and technical support duties in support of financial aid programs and services; administers federal, state, and District financial aid program funds; maintains accountability for financial aid funding; provides program accountability for financial aid sources, including representing the Financial Aid Department during audits; serves as a technical expert regarding area of assignment, including building reports, maintain system emails, coordinating District refunds; guides department staff and activities related to area of assignment; and serves as a technical advisor for updating, troubleshooting, and maintaining the District's Banner Enterprise Resource Planning (ERP) systems financial aid module and related software.

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. Participates in the development and design of financial aid software reporting tools; builds and maintains financial aid processing rules within the software; coordinates with Information Technology Services (ITS) to install network software and updates, including EdConnect; coordinates with third-party verification software for system setting and manages ChatBot features; modifies and inputs data elements to comply with regulatory changes; coordinates with representatives from federal and state agencies to troubleshoot problems with specialized software and data base integrity; designs reports to provide information to applicable agencies; participates with setting up and managing financial aid processing rules within ERP system, including configuring and maintaining the systems; has primary responsibility for interacting with the ITS tech support; creates database queries using Structured Query Language (SQL); creates and updates ERP system parameters needed to calculate student financial need.

2. Trains department staff on ERP system and other third-party software; reviews assigned work to ensure compliance with the awarding of aid, as needed.

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. Reconciles federal funds by coordinating with appropriate staff using the U.S. Department of Education's software; performs funds management and reconciliation duties; ensures that procedures, policies, rules, and regulations are applied to all financial aid programs; analyzes and calculates financial aid funding needed from programs; monitors federal and state accounts to ensure financial aid monies are accurately drawn and deposited into correct District accounts; coordinates with 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 appropriate staff and the Placer County Treasurer accounting systems; monitors repayments; balances fund accounts; reconciles assigned accounts.

5. Builds and performs funds eligibility and disbursement duties; analyzes applications and verifies eligibility; verifies that preliminary student file work is correct and meets regulations; generates student financial aid packages; monitors attendance and academic progress of federal and state financial aid students; corrects amounts, returns checks, and requests stop payment or reissue of checks to ensure accurate receipt of aid by students; accounts for expenditures of financial aid funds; coordinates with appropriate staff to resolve problems.

6. Builds and maintain reports that determines, assigns, and makes adjustments to a budget and cost of attendance for each student; calculates financial need figures and sets family contribution amounts; determines and assigns packaging group; sets-up packaging parameters for Federal Supplemental Educational Opportunity Grants; determines eligibility for funds, standard and emergency grants, programs, Federal Work Study (FWS), and subsidized or unsubsidized loans and plus loans; builds, sends and oversees the preparation of award letters; ensures that the proper student type is awarded aid according to federal regulations.

7. Prepares and transmits common origination and disbursement files and transfer monitoring files to the U.S. Department of Education for each eligible student; monitors school user activities within the Financial Aid Department; identifies and clears errors, rejects or discrepancies prior to authorizing payment to each student.

8. Builds and performs research and reporting duties; gathers, interprets, and analyzes a variety of data; completes and prepares records and reports; develops and creates reconciled data files for transmission to other agencies; gathers data and information to send correspondences that include Multiple Reporting Records and Pell Over award Process (MRR and POP) reports for other institutions; manages reports generated by the U.S. Department of Education, including negative disbursements, financial aid staff access to databases, records selected for verification, and statements of account totals.

9. Assists the assigned manager with gathering, interpreting, and analyzing District financial aid data for the Fiscal Operations Report and Application to Participate (FISAP); compiles and completes the FISAP to determine and maintain Districts, funding allocations and participation in Federal and State financial aid programs.

10. Coordinates and administers the Return of Title IV funding (RT24); determines District monetary liability and returns funding to the correct U.S. Department of Education program, as needed; determines student repayment amounts.

11. Performs customer service and marketing duties; serves as point of contact and provides information to students and District staff regarding financial aid programs and services. including providing assistance with completing financial aid and scholarship applications; represents the District at activities with local high schools, agencies, and organizations; interacts with other departments to provide students with comprehensive financial aid packages; conducts financial aid workshops; coordinates award activities.

12. 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.

13. 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 to others regarding changes and new regulations including creating and disseminating new instructions.

14. Reconciles scholarships and returns unawarded funds to the donor.

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.
- Financial aid management systems and a variety of specialized off-campus software applications.
- 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), 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.
- Execute and review financial aid and other student loan applications, including the Free Application for Federal Student Aid (FAFSA) and California Dream Act (CADA).
- Make presentations to groups.
- Conduct technical research and 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 moderate to complex 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

- Four 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