

## **FINANCIAL AID SPECIALIST**

### **DEFINITION**

Under general supervision, performs technical duties related to evaluation of student financial aid information; determines financial need and eligibility for various federal, state, District and other financial aid programs; researches and verifies data in manual and computerized records systems; advises and assists students regarding financial aid problems; and performs related work as assigned.

### **DISTINGUISHING CHARACTERISTICS**

This is the first technical level class in the Financial Aid Support Series within the Yosemite Community College District (YCCD). Positions in this class are responsible for reviewing and verifying financial aid applications and related information and determining financial aid eligibility and need. Duties often require substantial research/follow-up with various parties in order to obtain and validate information.

This class may be distinguished from the lower-level class of Financial Aid Assistant because incumbents in that class preponderantly perform clerical duties related to the initial intake of information and the provision of customer service. This class may be distinguished from the higher-level class of Financial Aid Specialist because incumbents in that class preponderantly perform highly specialized technical financial aid functions involving the most complex application, graduation and/or grade evaluation activities and/or may serve as lead workers on a regular basis with ongoing responsibility for assigning, directing, reviewing and monitoring the work of subordinates.

### **SUPERVISION RECEIVED AND EXERCISED**

Incumbents in this class work under the general supervision of a manager or senior manager, working alone on routine or regular work assignments and checking with a supervisor on non-routine assignments or when in doubt as to the correct procedures to follow.

An incumbent in this class does not directly lead or supervise other full-time employees, but may assign, direct and/or monitor the work of subordinate full time, part time, and/or student employees on a project or assignment basis.

### **EXAMPLES OF DUTIES** (*Illustrative Only*)

- Conducts and performs a variety of complex technical duties using independent judgement in interpreting and applying policies and procedures, while maintaining compliance with federal and state financial aid requirements
- Conducts comprehensive reviews of student financial aid files to verify completeness, and accuracy of all information and documentation supporting a student's financial aid status; identifies and assists in resolving compliance issues for required procedural or regulatory reporting, filling or submission.

- Masters the detailed technical knowledge and procedural requirements of each assigned program to serve as the program's in-house expert (Dream Act, Cal Grant, Chafee grants, etc.).
- Perform Financial Need Analysis and documentation in applicant files prior to awarding student. Re-evaluate and adjust awards for eligibility and enrollment changes.
- Serves as a financial aid liaison for on campus departments and programs; and community agencies.
- Assists in establishing financial aid parameters for the records management system; helps test and implement system changes; assists with investigating and correcting system failures.
- Performs technical administrative tasks involving research, verification and processing of student financial aid applications and information.
- Maintains a caseload of student aid files; compiles and organizes information.
- Advise and counsel students/parents on all aspects of financial aid including, but not limited to, satisfactory academic progress, eligibility, appeals, rules and regulation and processes.
- Researches, verifies and assesses student financial histories, including records of defaulted loans and/or repayment obligations at other institutions.
- Determines aid eligibility for a variety of federal, state, District and other financial aid programs based on well defined financial aid regulations, policies and practices.
- Advises and assists students with special financial aid problems; determines whether exceptions to policy may apply because of unusual circumstances; submits recommendations for student loan exceptions.
- Performs complex arithmetic calculations to determine award eligibility; performs and verifies complex computations related to special circumstances such as dependent support issues, military pay, tax credits, and other issues.
- Receives and processes disqualification and other appeals; notifies students of continued eligibility or disqualification; advises students of appeal processes.
- Receives and/or researches information pertaining to students who need to make financial aid repayments due to insufficient academic progress or other issues; identifies overdue debt amounts; notifies students of repayment requirements and attempts to set up repayment schedules.
- Locates and abstracts data from a variety of informational sources; enters student information into computerized records systems; updates hard copy files.
- Researches and responds to inquiries and complaints received from students, counselors, staff, faculty and others; explains federal, state and District financial aid regulations, policies and procedures.
- Retrieves student financial aid records for campus offices and student requests.
- Maintains and prepares reports for grant programs.
- Researches checks that have not been claimed by students; attempts to contact students and otherwise determine whether checks should be held, voided or replaced.
- Helps conduct financial aid workshops or presentations; attends conferences and trainings to stay current on financial aid requirements;
- Prepares correspondence, reports and other documents regarding technical issues; may prepare brochures and other informational material regarding financial aid and scholarship programs.
- Performs other related duties as assigned.

## **TYPICAL WORKING CONDITIONS**

- Work is generally performed in a standard office environment.

## **MINIMUM QUALIFICATIONS**

*To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The knowledge and ability requirements are representative of essential duties. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions of the position.*

### **Knowledge of:**

- Technical administrative office processes and procedures.
- Practices, methods, and procedures pertaining to academic financial aid.
- Policies, regulations and laws that apply to financial aid operations.
- Standard office machines and equipment; the use of management data systems and computers.
- Methods of technical administrative research and data summation.
- Appropriate English usage, spelling, grammar, punctuation, and arithmetic concepts.
- Basic techniques and strategies of organization and follow through.
- Operational procedures and rules specific to the assignment.

### **Ability to:**

- Perform technical administrative work requiring accuracy and attention to detail.
- Review financial aid documents for adherence to established requirements.
- Understand and apply legal mandates, District policies, rules, and regulations.
- Effectively and efficiently operate a personal computer; maintain computer database and spreadsheet information.
- Interview and gather information regarding financial aid eligibility from students.
- Read, understand and explain complex financial aid policies and procedures.
- Work with individuals of various backgrounds and under stressful situations.
- Perform moderately complex arithmetical calculations and verify the results.
- Communicate effectively, both orally and in writing.
- Establish and maintain cooperative working relationships with those contacted during the course of the work.

### **Licenses and Certificates:**

- Depending upon assignment, a valid license to drive in California may be required.

### **Physical and Mental Standards:**

- **Mobility:** ability to sit and stand for long periods, move about an office, and occasionally reach above and below desk level.
- **Dexterity:** fine manipulation sufficient to operate a computer keyboard, handle individual papers, write and take notes.

- **Lifting:** frequent lifting of papers, files, equipment and material weighing up to 10 pounds.
- **Visual Requirements:** close vision sufficient to read files, documents, and computer screens and do close-up work; ability to adjust focus frequently.
- **Hearing/Talking:** ability to hear normal speech, speak and hear on the telephone, and speak in person.
- **Emotional/Psychological Factors:** ability to make decisions and concentrate; frequent contact with others including frequent public contact; frequent deadlines and time-limited assignments.

**Education and Experience:**

*Any combination of education, experience and/or training that would likely provide the above-required knowledge, skills and abilities is qualifying. Typical background patterns that would provide the knowledge, skills and abilities are:*

- Education: Possession of an associate's degree from an accredited college or university, with course work in business administration, finance, accounting, or a closely related field.
- Experience: Two years performing general office administrative support work.

*Class Adopted: 03/01/09*

*Class Amended: **7/1/2021***