

FINANCIAL AID SPECIALIST - LEAD

DEFINITION

Under direction, leads and performs specialized technical duties related to the distribution of financial aid awards and the maintenance of related account control records; directs, monitors and/or performs the most complex follow-up and verification duties; monitors and audits student records to ensure that financial aid awards meet appropriate regulations and guidelines; coordinates and administers complex financial aid repayment and reporting processes; serves as a lead worker and/or advanced technical resource for subordinate employees; and performs related work as assigned.

DISTINGUISHING CHARACTERISTICS

This is the second and advanced technical level class in the Financial Aid Support Series within the Yosemite Community College District (YCCD). Incumbents have specialized program or project responsibilities that require advanced technical knowledge of the assigned subject area in order to make decisions and complete assignments. Positions in this class are responsible to lead and for performing the most specialized and complex technical duties within the work unit, including those related to complex financial award packaging, account control, program compliance and fiscal reporting functions. Incumbents serve as technical specialists within the work unit and also serve lead workers over subordinate staff on a regular basis.

This class may be distinguished from the lower-level class of Financial Aid Technician because incumbents in that class perform technical duties related to the evaluation of student financial aid information and the determination of financial need and eligibility, but do not serve as full-scope lead workers and do not perform complex and specialized duties such as those directly related to the final disbursement of and accounting for financial aid funds.

SUPERVISION RECEIVED AND EXERCISED

Incumbents in this class work under the direction of a manager or senior manager, receiving occasional supervision while working toward a definite objective that requires use of a wide range of procedures. Incumbents plan and/or determine specific procedures or equipment required to meet assigned objectives and solve non-routine problems, referring only unusual matters to a supervisor.

An incumbent in this class does not directly supervise other full-time employees, but may serve as a lead worker by assigning, directing and/or monitoring the work of subordinate full-time employees on a regular basis.

EXAMPLES OF DUTIES *(Illustrative Only)*

- Leads, directs and performs highly complex technical work related to the disbursement of and accounting for financial aid payments to students.

- Manages, coordinate and presents appeal processes; independently makes appeal decisions to approve or deny on a case by case basis due to SAP disqualification; leads appeal committee; consults with counselors and SSSP as needed.
- Maintains and updates Policy and Procedure manual as needed to reflect Federal and State regulations.
- Processes ID Verification and monitors for possible fraud. Suspends refunds as needed.
- Coordinates Cal Grant program operations; GPA & Enrollment data submission; Education Level verification; awarding procedures; batch awarding; BA program eligibility.
- Completes ISIR load process; updates college location; runs budget and packages CCPG Fee Waiver.
- Prepares financial aid packages based on specific program eligibility and total award amount; reviews and verifies initial and ongoing student eligibility to receive various program funds; identifies awards available through various sources; combines funds to create a total financial aid award; prepares documentation to release or hold warrants.
- Monitors student records for Satisfactory Academic Progress (SAP) and other criteria to ensure that financial aid obligations have been met and determine whether additional financial aid disbursements can be released; notifies students of continued eligibility or disqualification; advises students of appeal processes.
- Prepares and distributes award notification letters and other communications with students to advise them of their award eligibility and the expected disbursement dates, as well as any restrictions; maintains contact with students throughout the school term and advises them of any updates or revisions due to status or income changes.
- Receives and processes requests for emergency short term loans; accesses student information to determine how much a student may receive on an emergency basis prior to transmittal, and submits request to manager for approval.
- Receives and evaluates disqualification and other appeals; verifies that students are following proper procedures; holds checks for students who are not in compliance.
- Performs technical analysis and reporting on various financial aid funds; maintains and monitors budgets for specialized programs; monitors and disbursements and reconciles program accounts.
- Performs complex technical record management duties.
- Identifies students with overdue financial aid repayment debt; performs complex calculations to establish amounts owed and timeframes for repayment; counsels students regarding debt management and authorizes special repayment agreements; prepares complex correspondence and reports related to repayment activities; notifies students and external agencies about defaulted accounts.
- Assists in establishing financial aid parameters for the records management system; helps test and implement system changes; assists with investigating and correcting system failures.
- Investigates and resolves complex technical problems and issues encountered by subordinate staff; responds to complex inquiries from counselors, staff and faculty for information regarding financial aid policies and procedures.
- (listed above) Attends meetings; participates on committees and task forces as assigned.
- 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:

- Methods, practices, and procedures of technical financial aid accounting and budget control record management.
- Operation of manual and computer-assisted accounting and budget control record management systems.
- Organization and planning methods, trends, techniques, and practices.
- Employee leadership and performance motivation.
- Advanced operations, services and activities of a college financial aid office.
- Methods and techniques of interviewing and gathering information related to financial aid eligibility.
- Methods and techniques of financial aid disbursement and loan administration.
- Various financial aid programs, policies, grants and systems.
- Applicable computer software applications.
- Advanced business letter writing and report preparation.
- Modern office procedures, methods and equipment including computers.
- Pertinent Federal, State and local laws, codes and regulations pertaining to financial aid.

Ability to:

- Perform complex technical accounting and budget control functions.
- Review, and analyze accounting and budget control files, records, summaries, and reports.
- Make complex arithmetical calculations and verify the results.
- Advise, evaluate and award financial aid.
- Interview and gather information related to financial aid eligibility from students.
- Interpret and explain complex financial aid policies and procedures.
- Deal with students of various backgrounds under stressful situations.
- Analyze and interpret financial aid related data.
- Maintain complex computer database information.
- Maintain accurate records and files.
- Prepare a variety of clear and concise reports.
- Operate office equipment including computers and supporting word processing and spreadsheet applications.
- Respond to complex requests and inquiries from the general public.

- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of 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:** occasional lifting of papers, files, equipment and material weighing up to 15 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 substantial 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:

Pattern I

- Experience: Two years equivalent to a Financial Aid Specialist at YCCD.

OR Pattern II

- 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: Four years performing financial aid work in a college or university setting, including two years that included technical review and processing of financial aid applications.

Class Adopted: 03/01/09
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