



Financial Aid Specialist

Classified Range: 40

Board Approved: 11/18/21 P. 1|4

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job; however, any additional duties will be reasonably related to this class.*

SUMMARY DESCRIPTION

Performs a variety of technical duties in support of the financial aid and scholarship programs.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Specialist position is distinguished from the Financial Aid Technician position additional responsibilities requiring considerable experience that may include the electronic transfer of all student applications to and from the federal government's database and providing assistance to the Assistant Financial Aid Director.

SUPERVISION RECEIVED AND EXERCISED

Receives limited direction from appropriate supervisor; refers only unusual decisions to supervisor. May provide technical and functional direction to assigned student workers.

REPRESENTATIVE DUTIES

The following duties are typical for this classification.

1. Imports financial aid applications from the federal database for financial aid processing; renames files and forwards applications to appropriate staff for review; enters necessary corrections on applications and redistributes to staff; exports finalized applications into federal government systems.
2. Verifies eligibility and required student information through a variety of sources, including Financial Aid Administrative Access (FAA), National Student Loan Data System (NSLDS), Common Origination and Disbursements (COD), and Selective Service (SS).
3. Reviews and processes student files selected for verification; reviews and verifies student tax returns transcripts for accurate information; reviews student grade transcripts for satisfactory progress and dismissal.
4. Verifies the accuracy of requesting student's Satisfactory Academic Progress (SAP); requests and reviews student transcripts to ensure compliance of SAP and other regulations; reviews student enrollment grades for financial aid approved appeals and for students on probation; verifies SAP components are complete and scanned into student files to receive the disbursement.
5. Assists students at the counter; responds to questions from students, parents, and staff; provides information regarding financial aid programs including eligibility requirements, types of available assistance, and opportunities for self-help.
6. Compiles all necessary documentation; prepares folder for each financial aid student; reviews and revises information as necessary during the award process.
7. Determines student eligibility and financial needs according to clearly established criteria set forth by federal guidelines and District policy; assists in making initial awards, adjustments, and in the distribution of loan funds.



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8. Processes loans/financial aid awards; notifies students of awards or denial of awards; follows up with students with incomplete documentation to complete eligibility; adjusts awards based on student receiving scholarships and other outside assistance.
9. Prepares periodic reports on accumulated expenditures and balances in preparation for fund disbursements.
10. Maintains financial aid student records and related documentation; reviews and updates pertinent financial aid data.
11. Stays current on legislative updates pertaining to financial aid; updates and maintains required licensure required to access federal databases.
12. Performs other duties related to the primary job duties.

MINIMUM 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.

CORE COMPETENCIES:

Analyzing and Interpreting Data

- Apply sorting, coding and categorizing rules
- Analyze data
- Read reports
- Draw meaning and conclusions from quantitative and/or qualitative data

Customer Focus

- Attending to the needs and expectations of customer
- Seeks information about the immediate and longer term needs of the customer
- Anticipates what the customer may want or expect in a product or service
- Works across organizational boundaries to meet customer needs **

Reading Comprehension

- Understanding and using written information
- Knows the meaning of printed words; comprehend the literal meaning of text
- Make interpretations, applications, deductions, inferences, extrapolations from written information **

Professional and Technical Expertise

- Applying technical subject matter to the job **
- Knows the rudimentary concepts of performing the essential technical operations



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Critical Thinking

- Analytically and logically evaluates information to resolve problems
- Follow guide, SOP or other step by step procedures for locating the source of a problem and fixing it
- May detect ambiguous, incomplete, or conflicting information or instructions**

Attention to Detail

- Focusing on the details of work content
- Shows care and thoroughness in adhering to process and procedures that assure quality
- Applies knowledge and skill in recognizing and evaluating details of work**
- Applies skilled final touches on products

Using Technology

- Working with electronic hardware and software applications
- Using basic features and functions of software and hardware
- Experiments and finds novel uses for standard features and functions **
- Adds, improves, modifies, or develops features and functionality**

Team Work/Involving Others

- Collaborating with others to achieve shared goals
- Engages others for suggestions and ideas

Writing

- Communicating effectively in writing
- Using correct writing mechanics including spelling, vocabulary, grammar, syntax, punctuation, capitalization, sentence structure
- Logically orders and structures ideas and progression of thought

Adaptability

- Responding positively to change and modifying behavior as the situation requires**
- Accept and adjust to changes and the unfamiliar

Innovation

- Imagining and devising new and better ways of doing things**
- Fix what is broken; find solutions and fixes with resources at hand
- Finds new approaches to performing familiar tasks
- Create and invent new ideas; envision the unexpected, unexplored, untried**

Listening

- Comprehend and verbal instructions and orally presented information



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- Recalls or retrieves key points in a conversation
- Listen actively by rephrasing others' input cogently and accurately**

Legal and Regulatory Navigation

- Understanding, interpreting, and ensuring compliance with laws and regulations
- Locates, understands, or provides factual regulator information**
- Works within the bounds and limits of what is permissible

Professional Integrity and Ethics

- Follows a clear-cut set of rules
- Understands practical necessity of rules and ethical guidelines
- Shows consistency in behavior and judgement over a long term and varied situations

Valuing Diversity

- Shows acceptance of individual differences
- Welcomes input and inclusion of others who may be different from oneself
- Shows understanding and empathy for the challenges of groups seeking inclusion or dealing with perceived discrimination

***Lead, Advanced or Senior Level Positions*

Education and Experience Guidelines

Education/Training:

Equivalent to completion of high school supplemented by twelve (12) units of college level course work in business administration, accounting, or a related field.

Experience:

Three (3) years of increasingly responsible financial aid program experience.

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 with frequent student contact.

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 stoop, bend, kneel, crouch, reach, and twist; to occasionally lift, carry, push, and/or pull light to moderate amounts of weight up to 25 pounds; 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.