

### FINANCIAL AID ASSISTANT

| **Reports to:**  | Director, Financial Aid & Scholarships |  |  |
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| **Dept:** | Financial Aid & Scholarships | **Range:** | 17 |
| **FLSA:** | Nonexempt | **EEO:** | Secretarial/Clerical |

*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 by individual positions.*

### BASIC FUNCTION:

Under general supervision, serve as the primary point of contact for the Financial Aid Office, providing customer service in person, by phone and via email; determine eligibility for Board of Governors (BOG) Fee Waivers, maintain necessary records and reconcile program expendi­tures; perform a variety of duties related to federal and state financial aid programs for students; provide technical assistance and information to students, staff and the public; and perform related duties as assigned.

### ESSENTIAL DUTIES & RESPONSIBILITIES:

*The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.*

1. Serve as the primary point of contact for the Financial Aid Office; provide information and answer questions from students, parents, faculty, staff and others regarding various federal and state financial aid programs and financial aid processes, procedural guidelines, applica­tion and documentation requirements and deadlines for application and disbursement; refer students to other agencies as necessary to obtain required documentation; perform prelim­inary, moderately complex evaluations to determine student eligibility in meeting federal and state financial aid require­ments; provide information to students on the status of their federal aid applications.
2. Schedule financial aid counseling appointments for students and maintain automated appointment schedule for Financial Aid Office staff; provide appointment reminders to staff daily; answer telephones and provide information and assistance as required.
3. Process Board of Governors waiver applications; review income verification documents and request additional documents as needed; make eligibility determinations based on State Board of Governors fee waiver eligibility requirements; enter information into the computer to be accessed by the automated registration program; provide information and assist­ance to other Student Services departments regarding the Board of Governors Fee Waiver program; compose and transmit correspondence to students relating to Board of Governors waivers; assist with the annual reconciliation of Board of Governors fee waiver expenditures.
4. Instruct students in correct procedures for completion of forms and applications; explain applications, requirements and restrictions; maintain and update records of prospective recipients; compose and transmit correspondence to students regarding enrollment fees, nonresident tuition deferments and related subjects
5. Maintain accurate records to track activities and to meet state and federal audit require­ments; audit records to ensure accuracy; monitor collection of deferred fees owed by students; ensure accurate accounting through computer entry of enrollment changes and fees collected or owed; place holds on student records as needed; initiate refund requests when appropriate; monitor student fee transactions to ensure correct tracking of payments and refunds; resolve problems in coordination with Admissions and Records and Fiscal Office staff.
6. Initiate and compose correspondence as appropriate; type memoranda and a wide variety of materials; make and post signs on ad hoc basis to inform students and staff of special deadlines, requirements and events.
7. Assist Director, Financial Aid & Scholarships with administration of special local and/or district student assistance programs.
8. Perform preliminary screening of any applicable campus-based loan program applicants (such as emergency and/or book loans) for the Director, Financial Aid & Scholarships or Technicians.

OTHER DUTIES:

1. Conduct financial aid workshops regarding the processing of financial aid applications.
2. Attend workshops, conferences and other training sessions involving financial aid as assigned.
3. Provide training and work direction to student workers as assigned.
4. Perform related duties as assigned.

### KNOWLEDGE AND ABILITIES:

### KNOWLEDGE OF:

1. College organization, functions, rules, policies and procedures applicable to a college financial aid office.
2. Applicable sections of the state education code relevant to assigned responsibilities.
3. The Family Educational Rights and Privacy Act and other college, state and federal laws, rules, regulations and policies governing student admissions, enrollment and financial aid.
4. Computer operations and use of standard business applications including word processing, spreadsheet and database software, and other specialized college software applications such as PeopleSoft.
5. Nontechnical policies and objectives of federal and state financial aid programs.
6. Written and oral communication skills including correct English usage, grammar, spell­ing, punctuation and vocabulary
7. Office administration practices and procedures, including filing and recordkeeping systems.
8. Basic research methods and procedures.
9. Business math.

### Concepts, practices and techniques of customer service.

1. Safety policies and safe work practices applicable to the work.

### ABILITY TO:

1. Learn to interpret, apply and explain rules, regulations, policies and procedures and apply them in a variety of procedural situations, particularly those involving financial aid programs, requirements, processes and deadlines.
2. Evaluate alternatives and reach sound decisions within areas of assigned responsibility.
3. Operate a computer and standard business software.
4. Respond in person and by telephone to a high volume of varied inquiries and requests calmly, patiently and effectively.
5. Prepare clear, concise and accurate records, data entries, reports and other written materials.
6. Work independently with little direction.
7. Understand and follow oral and written directions.
8. Maintain the confidentiality of department and student records and information.
9. Demonstrate sensitivity to and understanding of diverse academic, socioeconomic, cultural, ethnic and disability issues.
10. Establish and maintain effective working relationships with all those encountered in the course of work.

### EDUCATION AND EXPERIENCE:

Graduation from high school or GED equivalent and one year of clerical or administrative work experience that provided familiarity with financial recordkeeping and preferably involved frequent public contact; or an equivalent combination of training and experience.

### LICENSES AND OTHER REQUIREMENTS:

A valid California driver’s license and the ability to maintain insurability under the district’s vehicle insurance program.

**WORK DIRECTION, LEAD AND SUPERVISORY RESPONSIBILITIES:**

Provide work direction to student workers and/or temporary staff.

**CONTACTS:**

District administrators, faculty, staff, students, parents, other college and community organi­zations, vendors, contractors and the public.

**PHYSICAL EFFORT:**

*The physical efforts described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Primarily sedentary with intermittent standing, walking, bending and stooping, occasional light lifting and carrying of objects weighting up to 25 pounds; repetitive use of a computer keyboard, mouse or other control devices; ability to travel to a variety of locations on and off campus occasionally as needed to conduct district business.

**EMOTIONAL EFFORT:**

Ability to develop and maintain effective working relationships involving interactions and com­munications personally, by phone and in writing with a variety of individuals and/or groups from diverse backgrounds on a regular, ongoing basis; ability to work effectively under pressure on a variety of tasks concurrently while meeting established deadlines and changing priorities.

**WORKING CONDITIONS:**

Primarily business office environment; subject to frequent public contact and inter­ruption; inter­mittent exposure to individuals acting in a disagreeable fashion; usual assignment worked during daylight hours with occasional evening, week­end and/or holiday hours required on an as-needed basis. Occasional local travel may be requested.