

FINANCIAL AID OUTREACH ASSISTANT

SALARY GRADE: [C1-41](#)

DEFINITION:

Under the direction of assigned supervisor, perform specialized outreach duties to increase and promote awareness and participation in student financial aid programs; provide financial aid information to students, parents; staff, and the general public; and assist in determining financial aid eligibility according to federal and State regulations and requirements.

EXAMPLE OF DUTIES AND RESPONSIBILITIES:

Depending upon assignment, duties may include, but are not limited to, the following:

1. Perform financial aid outreach and follow-up activities to targeted populations; present financial aid information to students, parents, staff, and the general public in a variety of settings, including high schools and college classes.
2. Assist Financial Aid staff in formulating and implementing outreach strategies.
3. Provide technical assistance and information to students regarding regulations and requirements of various federal, state and district financial programs such as grants, loans, work-study, fee waivers, scholarships, and contingency funds.
4. Instruct students in correct procedures for completion of forms and applications; inform applicants of requirements and restrictions; review forms and data files for accuracy and completeness; verify consistency of information.
5. Assist applicants by accepting forms and documents, interpreting dependent or independent status, resolving complaints, explain eligibility and other factors.
6. Provide assistance, information and training to faculty, other campus staff and the public as requested or assigned.
7. Review and determine status of applications and forms; refer difficult issues for assistance and resolution; notify students of need for additional information.
8. Answer telephones and e-mail and provide information and assistance as required.
9. Prepare, receive and transmit student and account data files to verify student status, report disbursements and update borrower records.
10. Schedule and conduct group and/or individual entrance and exit interviews for student loan borrowers and student employees.
11. Interview Work-Study students for placement into positions on and off-campus; monitor coordination of off-campus work assignments.
12. Collect, compile, verify and record information for the preparation of various reports and/or reporting processes.
13. Maintain complex electronic records and prepare electronic reports according to established guidelines and procedures.
14. Operate a variety of office equipment including a word processor, computer terminal, copy and adding machine, and other peripherals.

15. Verify eligibility for and accept awards, which initiate disbursements in a variety of programs according to established guidelines and procedures.
16. Respond to requests from other educational institutions, agencies, lenders, creditors and prospective employers involving verification of student status and records.
17. Attend training sessions and workshops to remain current on financial aid regulations and procedures, which affect assigned duties.
18. Train and provide work direction and guidance to student assistants; assist in the hiring process of casual and student employees; monitor payroll for respective student assistants.
19. Perform related duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

1. Rules, regulations and policies of the financial aid programs.
2. Principles and techniques of interviewing in an environment with a diverse clientele.
3. Operation of a computer and related software.
4. Oral and written communication skills.
5. Record-keeping techniques.
6. Interpersonal techniques using tact, patience and courtesy.

Ability to:

1. Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation of community college students, faculty and staff.
2. Perform specialized outreach duties to increase community awareness of financial aid programs.
3. Provide assistance and information to students, staff and the public.
4. Determine program eligibility based on application data and supporting documentation.
5. Interpret and apply laws, rules and policies of the financial aid program.
6. Communicate effectively both orally and in writing.
7. Continually upgrade knowledge of hardware and software provided as tools to perform duties.
8. Establish and maintain cooperative and effective working relationships with others.
9. Maintain accurate records and prepare reports.
10. Assign and review the work of part-time and student employees.
11. Analyze situations accurately and adopt an effective course of action.
12. Work independently with little direction and represent the entire financial aid program in public settings.
13. Meet schedules and time lines.

Education and Experience

Any combination equivalent to:

1. College-level coursework.
2. Three (3) years general clerical office experience involving public contact.

WORKING CONDITIONS:

Environment:

1. Indoor and outdoor environment.
2. Constant interruptions.

Physical Abilities:

1. Hearing and speaking to exchange information in person and on the telephone and make presentations.
2. Dexterity of hands and fingers to operate computer keyboard and related equipment.
3. Seeing to read various materials.
4. Standing for extended periods of time.
5. Reaching overhead, above the shoulders and horizontally.
6. Bending at the waist, kneeling or crouching.
7. Lifting, carrying, pushing or pulling heavy objects up to 30 lbs.

Date Approved:
EEO Code: H-40