



FINANCIAL AID SPECIALIST

DEFINITION

Under general supervision, performs specialized duties related to the operation of the District's financial aid programs; interviews, advises, and assists students with program services; processes and awards student financial aid according to federal and state regulations and District policies and procedures; provides information to students and District staff regarding financial aid programs and services; performs outreach duties to promote and increase participation in student financial aid programs; provides assistance for a wide variety of assignments related to the development and implementation of assigned programs, projects, and services; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned supervisory or management personnel. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is the journey-level class Financial position that is responsible for performing specialized program implementation and outreach activities in support of Financial Aid programs. The work has technical aspects requiring the interpretation and application of policies, procedures, and regulations and involves frequent contact with students, faculty, and outside organizations. Positions at this level perform the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Financial Aid Coordinator in that the latter is the advanced journey-level class in the series responsible for assigning and reviewing the work of assigned staff involved in financial aid support services.

EXAMPLES OF TYPICAL FUNCTIONS (Illustrative Only)

- Performs specialized duties involved in processing and evaluating application materials and funding of financial aid opportunities to eligible students.
- Verifies initial and continuing eligibility of students who have applied for or been granted financial aid and informs affected students of their status; resolves issues related to overpayments, concurrent enrollment, return to Title IV program coordination, and other financial aid issues in a timely manner.
- Verifies financial aid files to ensure accuracy of information provided by parents and students on financial aid applications in conjunction with IRS forms, social security records, and various agencies used to determine financial aid eligibility according to federal guidelines and forms.
- Analyzes and reviews applications and required documentation to determine financial need and program eligibility for a variety of federal, state, and District programs.
- Packages financial aid awards using standard needs analysis as defined in accordance with specific federal, state, and local guidelines; conducts entrance and exit counseling sessions with students.
- Authorizes and posts loan amounts to student accounts; makes adjustments as needed; reconciles and refunds disbursements.
- Provides accurate and timely reporting of student and aid information to lenders, servicers, and guaranty agencies.

- Assists in the planning and organizing of outreach activities targeting students eligible for special assistance and/or services.
- Coordinates and conducts workshops and presentations on various topics related to financial aid programs; creates, develops, and revises workshop materials, handouts, and packets.
- Prepares and maintains various programmatic and/or student files and records.
- Gathers, assembles, updates, and distributes a variety of department specific information, forms, records, and data as requested; prepares and maintains a variety of databases and reports.
- Provides information to students, parents, and District staff that requires the use of judgment and the interpretation of rules, regulations, policies and procedures; meets with students, parents, and District staff to obtain data, interpret information, and answer questions; prepares correspondence independently to answer questions, request information, or provide explanations.
- Assists in the implementation of special projects and programs as assigned.
- Maintains accurate and detailed spreadsheets, files, and records, verifies accuracy of information, researches discrepancies, and records information.
- Researches, compiles, and organizes information and data on topics related to programs in assigned area; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Provides technical and functional direction to assigned student workers; gives work assignments; reviews and controls quality of work; trains student workers and other staff in work principles, practices, methods, policies, procedures, and applicable federal, state, and local laws, rules, and regulations.
- Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and service delivery needs related to the development and implementation of financial aid programs.
- Procedures for planning, implementing, and maintaining a variety of presentations, activities, and programs.
- Research and reporting methods, techniques, and procedures.
- Principles and practices of data collection and report preparation.
- Record keeping principles and procedures.
- Applicable federal, state, and local laws, rules, regulations, ordinances, and organizational policies and procedures relevant to assigned area of responsibility.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Modern office practices, methods, and computer equipment and software relevant to work performed.
- Techniques for providing a high level of customer service by effectively dealing with the public, students, and District staff, including individuals of diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation.

Ability to:

- 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.
- Implement and coordinate assigned program services, projects, and activities.
- Prepare outreach activities, brochures, reports, and other related program materials.
- Provide sound advice and coaching to students related to financial aid programs and services.
- Conduct research; analyze, interpret, summarize, and present technical information and data in an effective manner.
- Compose and prepare basic reports, correspondence, and other written materials independently or from brief instructions.
- Make accurate mathematical, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Understand scope of authority in making independent decisions.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Organize work, set priorities, meet critical time deadlines, and follow-up on assignments.
- Effectively use computer systems, software, and modern business equipment to perform a variety of work tasks.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgement within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12th) grade supplemented by some college-level coursework in accounting, finance, or a related field, and two(2) years of increasingly responsible experience advising students, preferably in a financial aid office, or equivalent experience providing services involving significant public contact.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds with the use of proper equipment. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

Salary Grade: C1-45

FLSA: Non-Exempt

EEO Code: H-40

Board Approved: April 2021; Revised: March 2026