

## FINANCIAL AID TECHNICIAN

---

### **DEFINITION:**

Under general supervision, to guide students through the financial aid process; to inform of available programs and screen for eligibility; to provide office support work to the financial aid programs area; and to perform related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

Financial Aid Technician is the entry level in the Financial Aid classification series. Initially under close supervision, incumbents learn and perform the duties of the position. As experience is gained, there is greater independence of action and the scope of duties increases. The advanced classification is Financial Aid Specialist followed by Senior Financial Aid Specialist. Incumbents normally qualify for the higher level after gaining experience and demonstrating proficiency which meets the higher level requirements. The progression to the higher level job classifications is not automatic.

**ESSENTIAL DUTIES:** The following duties are typical of those performed by employees in this job title; however, employees may perform other related duties, and not all duties listed are necessarily performed by each employee in the job title.

- Reviews, analyzes and processes student applications for various types of financial aid including loans, grants, scholarships, work study, funds and waivers;
- Explains the benefits and requirements of programs to students; determines required documentation and assists students in completing application materials; certifies student eligibility for programs;
- Reviews and determines accuracy of transcripts and other documents supporting the application; checks citizenship and assesses academic and financial eligibility;
- Facilitates the scholarship review and selection process; prepares materials for committee members; prepares applications for donor selection;
- Applies dependency override as appropriate to establish a student's independence;
- Tracks fund amounts each student has used and reports to the funding or lending source;
- Adjusts financial aid amounts based on changes in the student's status;
- Provides financial aid counseling and delivers workshops on campus or at local high schools; conducts entrance and exit counseling workshops;
- Prepares award letters and grant reports;
- Assembles and maintains files containing confidential information and documents;
- Monitors hours worked by Federal Work Study students; verifies time sheets and submits to Payroll for payment; documents eligibility information for work study students;
- Processes and responds to verification and financial aid transcript requests;
- Prepares lists, correspondence and other documents; composes letters and drafts reports; designs, edits and updates brochures and flyers;
- Informs students of social service and other assistance agencies and programs; refers students to other College programs when appropriate;
- Maintains knowledge of programs and guidelines; reads bulletins and attends informational workshops, conferences and meetings;
- Inputs and retrieves data and generates reports from several data bases;
- Performs general office support duties such as typing, filing, reception, answering telephones, opening and distributing mail, and ordering office supplies;

- Coordinates scholarship ceremony;
- Trains and directs the work of student staff.

**MINIMUM QUALIFICATIONS:**

Knowledge of:

Lending regulations and default management.

Guidelines and regulations governing the eligibility, award, monitoring and reporting of student financial aid.

Computer applications and financial aid software.

Skill in:

Using spreadsheet, database, word processing and financial aid software.

Describing lending terms and requirements, and providing financial counseling to individuals with little practical financial experience.

Interviewing applicants and obtaining detailed personal information.

Organizing priorities to meet multiple deadlines.

Performing duties under tight deadlines, time constraints, and with conflicting demands.

Interpreting and applying regulations and guidelines pertaining to student financial aid.

Establishing and maintaining effective working relationships with persons of diverse socio-economic backgrounds.

Working in stressful situations, occasionally with angry or frustrated individuals.

Other Requirements:

Must possess a valid California driver's license and have a satisfactory driving record.

Specified positions within this class may request certification of bilingual skills as a desired qualification.

**ILLUSTRATIVE EDUCATION AND EXPERIENCE:** A typical way to obtain the above knowledge and skill is a combination of education and experience equivalent to:

Associate of Arts degree with courses in banking, finance, business, or other related degree and two years of experience in loan or financial aid processing, or other related experience.

**PHYSICAL CHARACTERISTICS:** The physical abilities involved in the performance of essential duties are:

Vision sufficient to view computer screen and read documents; standing, walking and bending to assist students at counter and retrieve files; manual dexterity to operate computer and write; may require some lifting. This work is performed indoors in a typical office environment with occasional off site visits for workshops and events.