FINANCIAL AID PROGRAM SPECIALIST I/II

DEFINITION

Under general supervision, provides a variety of specialized office support related to student financial aid programs; performs related duties as required or assigned.

CLASS CHARACTERISTICS

Financial Aid Program Specialist I is the entry level class of this series. Initially under supervision, incumbents learn federal, state and College procedures and policies involved in the processing of student applications for financial aid. As experience is gained, there is greater independence of action within established guidelines. This class is alternately staffed with Financial Aid Program Specialist II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency which meet the qualifications of the higher level class.

Financial Aid Program Specialist II is the experienced level class of this series, competent to perform a broad variety of financial aid support duties. The nature, diversity and scope of the work performed require the use of discretion and judgment within established guidelines. This class is distinguished from Financial Aid Technician in that the latter provides technical expertise in all phases of computerized processing of financial aid applications and payments in addition to performing the full range of Financial Aid Program Specialist duties.

EXAMPLES OF DUTIES (Illustrative Only)

- Receives, reviews, analyzes and processes student applications for various types of financial aid in accordance with state, federal and College guidelines
- Explains the benefits and requirements of financial aid various programs to students
- Determines required documentation and assists students in completing applications and other materials
- Reviews applications and other documents for accuracy and completeness
- Performs initial review of student's file, obtains any missing documentation and forwards the completed file to the advisor
- Enters student information into the computer processing system
- Determines academic and financial eligibility of students applying for financial aid following established guidelines, and monitors ongoing status
- Prepares loan check disbursement and verifies eligibility prior to approval
- Establishes and maintains files
- Processes and responds to various verification and financial aid award requests
- Prepares, verifies, processes and posts information and documents to various records
- Prepares letters and draft reports
- Prepares and posts receipts
- Refers students to other on-campus services for social service and other assistance programs
- Maintains up-to-date knowledge of program parameters and regulations
- May attend informational workshops, conferences and meetings to gather and disseminate information
- May assist with or make presentations to students in schools regarding aid programs
- Inputs and retrieves data and generates reports using an on-line system
- Performs general office support duties such as typing, filing, answering telephone calls and scheduling appointments
- Operates standard office equipment
- Directs the work of student staff and instructs staff in work procedures
- Performs related duties as required or assigned
QUALIFICATIONS

NOTE: The level and scope of the knowledge and skills listed below are related to job duties as defined under Class Characteristics.

Knowledge of:

- Federal and state laws and College laws, rules and regulations relating to financial aid for students
- The needs and sensitivities of special and disadvantaged student populations
- Effective customer service techniques and etiquette
- Business data processing principles and the use of word processing and/or personal computing equipment
- Record keeping principles and procedures
- Standard office practices and procedures, including filing and the operation of office equipment
- Business mathematics
- Correct English usage, including spelling, grammar and punctuation

Skill in:

- Interviewing students and obtaining required information
- Interpreting, explaining and applying rules, policies and procedures
- Analyzing problems, evaluating alternatives and making sound recommendations
- Using initiative and sound judgment within established procedural guidelines
- Preparing clear and concise reports
- Maintaining accurate records and files
- Maintaining confidentiality of information
- Making accurate mathematic calculations
- Establishing and maintaining effective working relationships with those contacted in the course of work
- Operating computer equipment and various software programs
- Typing or operating a keyboard with sufficient speed and accuracy to enter data into a computer data base

Other Requirements:

- Specified positions may require a valid California driver's license
- Specified positions may require or desire bilingual skill in a designated second language
- Must be willing to work evenings and weekends at various college sites

Education and Experience:

A typical way of gaining the knowledge and skills outlined above is:

**Financial Aid Program Specialist I:** Equivalent to graduation from high school and two years of office support experience involving public contact and the application of rules and guidelines.

**Financial Aid Program Specialist II:** In addition to the above, one year of experience in financial aid program services at a level equivalent to the College's class of Financial Aid Program Specialist I.