

CONTRA COSTA COMMUNITY COLLEGE DISTRICT JULY 1985

**FINANCIAL AID ASSISTANT I
FINANCIAL AID ASSISTANT II**

DEFINITION

To perform a variety of activities involving the dissemination of financial aid information to students; and to perform technical and clerical tasks in the maintenance and documentation of financial aid information.

DISTINGUISHING CHARACTERISTICS

Financial Aid Assistant I

This is the entry level class in the Financial Aid Assistant series and positions within this class are considered to be in a training status. This class is assigned a wide range of clerical duties relating to various financial aid programs and student applications for financial aid. Work at this level is distinguished from that of the Financial Aid Assistant II in that the duties are of a standard and prescribed nature, with financial aid programs and reporting systems which are less complex than those assigned to the Financial Aid Assistant II classification. Positions assigned to this class may be required to provide general and specific information at a student service counter, as well as to perform financial records documentation. As experience is acquired, the employee performs with increasing responsibility.

Financial Aid Assistant II

This is the journey level class in the Financial Aid Assistant series. Positions in this class are flexibly staffed and are normally filled by advancement from the lower class of Financial Aid Assistant I, or, when filled from the outside, require prior financial aid work experience. Appointment to the higher class requires that the employee be performing substantially the full range of duties for the class requiring a complete knowledge of District, state, and federal policies, procedures, and regulations pertaining to applicable financial aid programs and meet the qualification standards for the class. Positions assigned to this class may be distinguished from those allocated to the lower level of Financial Aid Assistant I by the higher level of applied knowledge and skill which is expected, and the staff assistance to higher supervisory levels which is required.

SUPERVISION RECEIVED AND EXERCISED

Financial Aid Assistant I

Receives general supervision from an educational manager.

Receives technical or functional supervision from higher level financial aid personnel.

Financial Aid Assistant II

Receives general supervision from an educational manager.

May exercise technical or functional supervision over less experienced financial aid personnel or student assistants.

(Over)

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EXAMPLES OF DUTIES

Duties may include, but are not limited to, the following:

Provide applications, information, and assistance to students regarding available financial aid programs, such as grants, loans, scholarships, and work study jobs.

Review financial aid application forms for accuracy and completeness; secure additional information from students as necessary.

Process financial aid applications and transcripts; prepare and maintain student folders.

Determine student eligibility for financial aid based upon established criteria pertinent to each program.

Input data into computer terminal for disbursement of checks and proper accounting procedures.

Notarize financial aid documents; process and forward "Offer of Financial Aid;" process clearance forms.

Order financial aid and loan applications; maintain office supplies.

Forward "mailers" to students concerning units during the semester; answer students questions regarding mailers.

Assist in the modification of forms and procedures as regulations change.

Tabulate and prepare statistical reports periodically and upon request.

May perform EOPS duties; identify EOPS students and determine eligibility; post EOPS grant amounts, units and GPA on EOPS recipients; input EOPS data using computer terminal.

Process college work study paperwork; maintain statistical data; process changes in student allocations; review college work study payment register and process "non-college work study" earnings.

Assist in the year-end closing of financial aid folders; destroy student folders after five years.

Open, date stamp, and route incoming mail.

Select, train, and supervise student assistants as assigned.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Financial Aid Assistant I

Knowledge of:

General methods and procedures of bookkeeping.
Office and clerical procedures, equipment, and systems.

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MINIMUM QUALIFICATIONS (CONTINUED)

Skill to:

Provide accurate information to students and other financial aid personnel.
Learn and apply relevant federal and state regulations, procedures and policies related to available loans and grants for students.
Perform assigned tasks with increasing independence, often under time pressures.
Respond to student inquiries in a courteous, tactful manner.
Learn to operate a computer terminal as assigned.
Type at a speed of not less than 45 net words per minute from clear copy.
Perform mathematical calculations with speed and accuracy.
Identify pertinent financial information and learn to understand how various financial aid programs operate.
Perform a variety of clerical and bookkeeping tasks with speed and accuracy.
Establish and maintain effective work relationships with those contacted in the performance of required duties.

Experience and Training

Any combination of experience and training that would likely provide the required knowledge and skills is qualifying. A typical way to obtain the knowledge and skills would be:

Experience:

One year of prior office experience including basic bookkeeping and public contact.

Training:

Equivalent to completion of the twelfth grade, including or supplemented by training in business office skills.

Financial Aid Assistant II

In addition to the minimum qualifications for Financial Aid Assistant I:

Knowledge of:

Basic interviewing techniques.

Skill to:

Read, understand, and interpret policies, procedures, rules, and regulations of student financial assistance programs to which assigned.
Operate a computer terminal, office calculator, personal computer and other office equipment with speed and accuracy.
Communicate effectively and tactfully in both oral and written form.
Perform responsibilities with independence and a high level of judgment, often under time pressures.
Provide accurate and complete information to supervisor as requested.

(Over)

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Experience and Training

Any combination of experience and training that would likely provide the required knowledge and skills is qualifying. A typical way to obtain the knowledge and skills would be:

Experience:

Two years of experience similar to that obtained as a Financial Aid Assistant I with a community/junior college or state university.

Training:

Equivalent to completion of the twelfth grade including or supplemented by training in business office skills.