

FINANCIAL AID SPECIALIST

DEFINITION

To perform a variety of duties involving the operation of the financial aid information office at a college; to coordinate the work of other classified staff involved in the financial aid function; and to provide accurate and timely information regarding financial aid to students and staff.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Specialist is the lead position and is assigned responsibility for the coordination of the financial aid function at a college. An incumbent is expected to successfully work with the more difficult financial aid cases.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from an educational manager.

May exercise technical or functional supervision over classified personnel and student assistants in the financial aid office.

EXAMPLES OF DUTIES

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

Plan, organize and coordinate the operations of the financial aid office, including the design, ordering and distribution of forms and other supplies, and the establishment of required student files and records.

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

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

Advise staff regarding policies and procedures on financial aid matters; interpret applicable regulations and policies.

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

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

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

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

Coordinate the processing and mailing of financial aid documents to students and answer students' questions regarding the documents.

EXAMPLES OF DUTIES (CONTINUED)

Maintain appropriate budget records and monitor expenses; keep a running balance of accounts, transfer funds, and notify management staff of budget status.

Select, train, and supervise hourly and student assistants as assigned.

Maintain time records and work schedules for assigned staff.

Develop appropriate procedures for the effective operation of the financial aid office, consistent with district and granting agency guidelines.

Prepare budgets for the financial aid office for review and adoption by management.

Tabulate and prepare statistical reports as required.

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.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

General methods and procedures of bookkeeping.

Office and clerical procedures, equipment, and systems.

Policies, procedures, rules, and regulations of student financial aid programs to which assigned.

Basic procedures for developing a budget.

Basic interviewing and training techniques for clerical positions.

Effective methods for maintaining appropriate levels of office supplies.

Skill to:

Read, understand, and interpret policies, procedures, rules, and regulations of student financial aid programs to which assigned.

Operate a computer terminal, office calculator, personal computer, and other office equipment with speed and accuracy.

Maintain budget records and monitor expenditures.

Act in a lead capacity in an office environment, assigning work and ensuring its successful completion.

Develop effective office operating procedures.

Type at a speed of not less than 45 net words per minutes from clear copy.

Perform mathematical calculations with speed and accuracy.

Establish and maintain effective working relationships with those contacted in the performance of required duties.

Communicate effectively both orally and in writing.

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Skill to: (Continued)

Perform responsibilities with independence and a high level of judgment, often under time pressure.
Provide accurate and complete information to supervisor as requested.

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 II with a community/junior college or state university, or institution of higher learning with similar requirements along with experience in a lead capacity in an office environment.

Training

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