



## FINANCIAL AID SPECIALIST, LEAD

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	62	07/01/2017	Classified	1 of 3

### DEFINITION

To provide assistance in the coordination of day-to-day operations of the Financial Aid Office; to perform complex tasks and provide lead technical and functional supervision; and to implement office policies and procedures.

### DISTINGUISHING CHARACTERISTICS

**Financial Aid Assistant I** – Positions in this classification are focused on routine, process driven tasks and performs less complex clerical or program support assignments while learning financial aid policies and procedures. Positions at this level usually exercise less independent discretion and judgement than that of a Financial Aid Assistant II.

**Financial Aid Assistant II** - Positions in this classification are assigned to the day-to-day complex technical duties in addition to general clerical work related to the assignment. Employees in this position have experienced knowledge of financial aid programs and procedures to independently assist students, staff, and community members at the front counter, over the phone, and through written and electronic correspondence.

**Financial Aid Specialist** - Positions in this classification are responsible for performing more specialized and complex technical duties within the work unit. Employees in this position also provide training and direction to departmental staff on a regular basis.

**Financial Aid Specialist, Lead** - Positions in this classification will help train and coordinate financial aid personnel. Employees in this position serve as an assistant to the Financial Aid Manager and provides on-going technical and functional lead supervision to the office staff.

### SUPERVISION RECEIVED AND EXERCISED

- Receives supervision from a departmental supervisor or manager.
- May receive technical or functional supervision from higher-level departmental personnel.
- Provides training and direction to student assistants or other assigned staff.

### EXAMPLES OF DUTIES

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

- Assists the manager in the coordination of the day-to-day office activities.
- Oversees the process for determination of eligibility of students to receive financial aid; assists in the determination of eligibility when situations are unusual.
- Oversees the day-to-day workloads of employees and ensures adequate staff during vacations and absences.
- Advises staff regarding policies and procedures on financial aid matters; interprets applicable regulations and policies.
- Participates in informing employees of changes in processes or policies; participate in interpretation of regulations and policies of the programs administered by the Financial Aid Office.



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- Attends workshops and trainings to remain current with relevant laws, rules and regulations.
- Communicates with internal and outside contacts, agencies and individuals regarding financial aid services and activities.
- Compiles student data and prepare various reports for internal/external departmental needs including state and federal agencies to fulfill compliance regulations and obtain or maintain program funding; reviews accuracy of data submitted; prepares annual federal operations and program participation reports.
- Reconciles program reports, resolves discrepancies between awards and disbursements and determines financial aid overpayments; coordinates the annual planning of scheduled disbursement dates.
- Inputs data for the disbursement of checks and for proper accounting of funds.
- Validates information for third party verification.
- Processes financial aid documents.
- Trains, schedules and supervises student assistants and other financial aid staff.
- Prepares time records for management approval.
- Develops appropriate procedures for effective operation consistent with District and granting agency guidelines.
- Processes return of funds, overpayments, unofficial withdrawals and other transactions.
- Compiles and prepares statistical reports as required.
- Assists in the year-end closing of financial aid folders and state audits.
- Performs related duties as assigned.

**MINIMUM QUALIFICATIONS**

Knowledge of:

- Federal and State Student Financial Assistance programs including policies, rules and regulations.
- General methods and procedures of recordkeeping.
- Modern office procedures, practices and technology/equipment.
- Modern software applications (Microsoft Office Suite, etc.).
- Policies, procedures, rules, and regulations of student financial aid programs.
- Procedures for maintaining a budget.
- Methods and techniques of comprehensive and technical report preparation.
- Interviewing and training techniques.
- Financial aid databases and websites used in the course of work, including FAFSA.gov, Central Processing System for Financial Aid Administrators Access, National Student Loan Database, Common Origination and Disbursement, and WebGrants.



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Skill/Ability to:

- Interpret and apply policies, procedures, rules, and regulations of student financial aid program.
- Maintain budget records and monitor expenditures.
- Develop effective office operating procedures.
- Lead, organize, and review the work of assigned staff.
- Make mathematical calculations accurately.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.
- Communicate effectively, both orally and in writing.
- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, race, ethnicity, gender identity, sexual orientation, age, mental or physical disability, and religious background of all students, faculty and staff, and with all individuals encountered in the performance of required duties.

**EXPERIENCE AND TRAINING**

- Four (4) years of experience performing responsible journey-level financial aid duties in a community college or other institution of higher education.

**EDUCATION/LICENSE OR CERTIFICATE**

- Possession of an Associate degree from an accredited college, or the equivalent.

**CONDITION OF EMPLOYMENT**

- Must not have any unresolved financial issues with the U. S. Department of Education that would prohibit the ability to obtain National Student Loan Data System (NSLDS) access immediately upon employment.

Adopted: 07/01/17