

FINANCIAL AID ACCOUNT SPECIALIST

BASIC FUNCTION

Assists in cash management processes such as: grants, loans, scholarships, and institutional aid disbursement processes, assuring compliance with all applicable regulations; provides information to a variety of stakeholders regarding grants, loans, scholarships, and assistance programs; processes financial aid requests; assures that the accounting process related to financial aid, grants, loans, scholarships, and institutional aid are current and accurate.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned area supervisor. May provide lead direction to temporary staff and/or student workers.

CLASS CHARACTERISTICS

This classification in the Financial Aid series is responsible for performing the full range of technical duties by reviewing, researching, analyzing, and processing financial aid requests, cash management and disbursements, working independently, and exercising judgment and initiative. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the department.

EXAMPLES OF TYPICAL JOB FUNCTIONS

1. Assists in reviewing, researching, analyzing, and processing financial aid disbursements for grants, loans, scholarships, and institutional aid disbursements in accordance with federal, state, and institutional regulations; and resolves conflicting information issues.
2. Advises and informs a diverse population of students and their families on financial assistance programs, options, responsibilities, and disbursement of funds; explains federal, state, and institutional funding sources and eligibility criteria; assists with the application procedure; explains policies to students, parents, and other campus constituents; responds to phone calls, email, and written requests in a timely and accurate manner.
3. Reviews financial aid applications for eligibility to ensure accurate data input and assists with end of year reports to the state; determines eligibility and administers waiver awards; ensures compliance with changing legislation; audits applications to ensure data is accurate; reviews and determines loss of appeals; notifies students, maintains spreadsheets, and files documents; develops annual applications; verifies Veteran eligibility utilizing documents received through the Department of Veterans Affairs.
4. Performs specialized duties in the grants, loans, scholarships, and institutional aid disbursement process; ensures that students receive their funds in compliance with mandated requirements; reports and maintains accurate records of any overpayments; assists with assigned cash management disbursement process workflows in relation to third party disbursement processes.
5. Assists students with specialized requests with updates, changes, and disbursement selection.
6. Collaborates to resolve conflicting disbursement information pertaining to student(s).
7. Collaborates and assists with financial aid educational workshops within the District and for various high schools in the District's service area; participates in education and training on financial aid regulations and procedures; keeps abreast of changes in regulations through participation in conferences, workshops, and training seminars.

8. Participates in District-provided in-service training programs.
9. Performs other related duties as assigned; specific duties not listed does not exclude them for this classification if the work is similar or related.

QUALIFICATIONS

Knowledge of:

1. Federal, state, and institutional regulations as applicable.
2. Multiple sources of financial aid and the processes through which they are available.
3. Principles and practices of eligibility determination.
4. Financial aid guidelines and application processes.
5. Mathematical principles.
6. College registration and matriculation process and services.
7. A diverse range of student loan and grant funded options and their financial oversight requirements.
8. Operational characteristics of multiple databases from funding agencies to ensure data is properly retrieved, entered, and submitted.
9. Grants, loans, scholarships, and institutional aid funding principles and practices, including those related to disbursements.
10. Applicable federal, state, and local laws, rules, regulations, ordinances, and organizational policies and procedures relevant to assigned area of responsibility.

Ability to:

1. Interpret and apply a wide variety of changing federal, state, and institutional policies and procedures.
2. Work efficiently with a diverse population of students and their families.
3. Make accurate mathematical computations.
4. Be thorough, organized, consistent, and accurate in processing disbursements.
5. Provide technical support to grant and loan funding processes and recordkeeping.
6. Appropriately answer financial aid questions, maintain confidentiality, and be discreet with student information.
7. Collaborate with various student services and academic departments.
8. Exercise independent judgment within general policy and procedural guidelines.
9. Effectively use computer systems, software applications relevant to work performed, and business equipment to perform a variety of work tasks.
10. Communicate effectively in the course of performing work tasks.
11. Establish, maintain, and foster effective working relationships with those contacted in the course of work.
12. Demonstrate clear evidence of sensitivity and understanding of the diverse academic, socio-economic, disability, and ethnic backgrounds of students, staff, and the community.
13. Provide efficient, high-level customer service to the public, vendors, contractors, and District personnel.

Education and Experience:

Completion of the twelfth (12th) grade and three (3) years of increasingly responsible experience supporting a financial aid program in an educational institution; or an equivalent combination of education, training, and/or experience.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This classification primarily works in an office and standing in and walking between work areas is occasionally required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Employees in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

The essential functions of this classification must be performed by the incumbents with or without reasonable accommodations.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset individuals in interpreting and enforcing departmental policies and procedures.