

**PERALTA COMMUNITY COLLEGE DISTRICT - April, 2000**

**CLASSIFIED JOB DESCRIPTION**

**FINANCIAL AID SPECIALIST  
(SEIU Local 1021 Salary Range 76)  
Job Code: 877**

**CLASS PURPOSE**

Under direction of the Financial Aid Program Supervisor, performs professional level work assisting in the planning, development, implementation and coordination of the college's financial aid program to students.

**WORK SCHEDULE**

This is normally a full-time position with a work schedule of five days and 40 hours/week. Duties are performed 12 months a year. May be required to work some evenings and Saturdays during peak periods, such as registration, audits, fiscal year end, graduation, etc.

**EXAMPLES OF ESSENTIAL DUTIES:**

Any one position may not include all of the duties listed nor do listed examples include all tasks which may be found in positions of this class. To perform this job successfully, an individual must be able to perform each essential duty of the position satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions required for the position.

- Process student financial aid applications that include the Board of Governor's Fee Waiver (BOGFW), Federal Student Aid Application (FAFSA), Cal Grants, and federal student loan applications
- Analyzes and evaluates the financial needs of students using federal and state guidelines for Federal College Work Study, Federal Supplemental Education Opportunity Grant, Pell Grant, Cal Grant, and other financial aid programs
- Reviews and evaluates required documentation and packages awards in accordance with established guidelines; interprets and applies federal, state and institutional regulations to determine and certify student eligibility
- Informs and advises students and parents regarding eligibility and responsibilities of financial aid programs; interprets and explains policies, application procedures and availability of funding from various sources
- Uses and maintains complex computer programs to analyze, process, record, retrieve and verify statistical data; operates computers, computer terminal, peripheral equipment, calculator, copier and other office machines
- Operates the Electronic Data Exchange (EDE) software to download Institutional Student Information Records (ISIR)
- Generates, verifies and analyzes computer reports to ensure accuracy and compliance with established requirements; reconciles financial and statistical data

**Job Description:** Financial Aid Specialist

- Downloads from the SAFE system financial aid records and transmits electronic data corrections to financial aid applications using the federal Title IV WAN software system
- Identifies and resolves problems related to effective delivery of financial aid; coordinates activities and communication with other campus and District personnel lenders, and state and federal agencies
- Monitors satisfactory academic progress of financial aid and loan students, and the Ability to Benefit requirements in accordance with appropriate Federal, State and local regulations and guidelines
- Provides input in the preparation, presentation and dissemination of public information about student financial assistance, including participation in updating of the Financial Aid Handbook
- Participates in the compilation of data for State and Federal reports, including BFAP and FISAP
- Participates in the development of annual financial aid budgets for students and the overall financial aid program budget for the Financial Aid Office
- Maintains student files and other records; provides assistance with special projects; prepares reports as requested
- Researches national student financial aid history data via the U.S. Department of Education National Student Loan Data System (NSLDS); and uses NSLDS to record financial aid overpayments
- Prepares and presents a variety of oral and written reports
- Trains and provides work direction to student workers and other personnel as assigned
- Disseminates information to students on the loan application process and default management plan and loan policy
- Conducts financial aid and/or loan workshops on/off campus and provides support to outreach programs with various community organizations and high schools
- Reconciles Pell Grant Reports; transmits Pell Grant payment information electronically to the U.S Department of Education via the SAFE program
- Resolves problems related to overpayments and incorrect disbursements
- Maintains current knowledge of financial aid program changes in governmental regulations and procedures, software and eligibility requirements by attending meetings, workshops and State, regional and District conferences
- Performs other related duties as required.

**MINIMUM QUALIFICATIONS**

1. Bachelor's Degree from an accredited college or university in one of the social sciences, business or related fields and one year of professional experience involving planning, organizing, administering, coordinating or promoting programs or projects in financial aid; or an equivalent combination of training and qualifying experience which demonstrates the ability to perform the duties of the position.

**Job Description:** Financial Aid Specialist

2. Knowledge of current Federal and State financial Aid regulations and guidelines.
3. Demonstrated ability to interpret and apply Federal and State regulations pertaining to the financial aid process and eligibility.
4. Ability to communicate effectively, orally and in writing.
5. Demonstrated knowledge of, and proficiency in, the operation and use of personal computers utilizing word processing, spreadsheet and database management software programs (e.g., MS Office Suite, MS Word, MS Outlook, MS Excel, MS Access and PowerPoint) and the Internet browser, websites and E-mail.
6. Understanding of, sensitivity to and respect for the diverse academic, socioeconomic, cultural, disability and ethnic backgrounds of Peralta Colleges' students, faculty, staff and community.

**DESIRABLE QUALIFICATIONS**

- Two (2) years of full-time experience providing financial aid assistance to students, applying appropriate Federal and State regulations and using appropriate financial aid documents.
- Experience working in a California Community College setting.
- Experience with processing student loan applications.
- Ability to work with students with special needs.
- Ability to demonstrate a student-centered orientation.
- Ability to handle numerous tasks simultaneously, meet deadlines and time limits.
- Ability to work independently with minimal direction.
- Ability to analyze situations accurately and adopt an effective course of action.
- Ability to read, interpret and apply financial aid policies and regulations.
- Ability to interpret U.S. Department of Education regulations as set forth in the Student Aid Handbook and Financial Aid Encyclopedia, and implement new guidelines set forth by the U.S. Department of Education.
- Possess strong organizational skills.
- Knowledge of Financial Aid SAFE System and Title IV WAN.

**ENVIRONMENTAL DEMANDS**

- Occasional work performed alone
- Constant work around and with people

**PHYSICAL REQUIREMENTS**

- Occasional standing, walking, stooping, kneeling, squatting, and climbing stairs
- Occasional lifting and carrying up to 15 lbs.

**Job Description:** Financial Aid Specialist

- Occasional pushing and pulling up to 20 lbs.
- Occasional twisting of body
- Occasional use of manual dexterity
- Occasional use of tactile acuity
- Occasional use of visual acuity from a distance, with depth, and for color
- Frequent work at a rapid pace
- Frequent reaching, high, low, and level
- Frequent audio acuity at all ranges, including speech
- Frequent visual acuity for reading
- Constant sitting
- Constant use of clear oral communication

**TOOLS AND EQUIPMENT USED**

- Standard Office Equipment.

Revised: N/A