Long Beach Community College District

CLASS SPECIFICATION
Financial Aid Specialist

Date Adopted: May 22, 2006

FLSA Status: Nonexempt
EEOC Job Category: Office and Clerical
Union Representation: Represented

GENERAL PURPOSE
Under general supervision, performs specialized and advanced clerical duties in the processing of applications and forms for a variety of financial aid grant, loan, work study and scholarship programs; assists students in applying for financial aid through governmental and private sources; compiles, organizes, verifies, records, processes and administers information to determine student eligibility for financial aid programs; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS
Financial Aid Specialists are responsible for performing specialized and advanced clerical duties in support of the District’s financial aid programs and services. Incumbents are responsible for processing financial aid applications and forms, verifying and processing information to determine student eligibility for financial aid programs and providing information and assistance to students on financial aid applications, filing requirements, timeliness requirements and restrictions. Incumbents are expected to perform these functions in an accurate, timely manner in accordance with District policies and federal, state and local legal requirements and regulations.

Financial Aid Specialist is distinguished from Financial Aid Advisor in that an incumbent in the latter class is responsible for performing the more complex and responsible duties for the District’s financial aid program, requiring a greater knowledge of District policies and federal, state and local requirements pertaining to student financial aid programs.

ESSENTIAL DUTIES AND RESPONSIBILITIES
The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Provides specialized assistance and information to students regarding financial aid programs and services available from federal and state grant programs and other sources; explains and assists students with financial aid applications, filing requirements, timeliness requirements and restrictions; explains departmental policies, procedures and functions according to established guidelines; researches and responds to requests for information from District officials, faculty, students and other institutions.

2. Instructs and assists students in correct procedures for completion of financial aid forms and applications; reviews completed forms for accuracy, timeliness and completeness; enters data into various programs and databases for processing of financial aid; processes a variety of financial aid

Financial Aid Specialist

Page 1
applications and forms for different funding agencies; operates a computer to obtain, verify and update financial aid information and records for students; processes, transmits, uploads and downloads student financial aid information to and from funding agencies; monitors and follows up on transactions and reports information to students and appropriate agencies; verifies student financial aid with Welfare, Department of Homeland Security and the Social Security Office.

3. Reviews applications and documents financial data; performs research, inquiries and investigation regarding information provided in applications to verify correctness and eligibility for financial aid; interviews students regarding income, assets, household composition, tax records and other personal matters related to financial aid program eligibility; reviews records for changes in status; requests transcripts, records and other information as needed to assure complete and accurate documentation; reads and transfers federal tax information; input, calculates and modifies student award packages based on eligibility for different financial aid awards.

4. Performs a variety of specialized duties for assigned financial aid programs; assists with student petitions for financial aid extension, independence and reinstatement and loan appeals; generates lost check warrants; determines payment eligibility and adjusts payments for students who attends less than full-time; accounts for financial aid funds received by the District and verifies the accuracy of payment amounts for each student; ensures that payment transactions and student status are reported correctly; verifies that disbursements match payments reported to funding agencies; receives payments and documentation regarding outstanding student debt; reviews and certifies payable classes and ensures student enrollment; awards summer Pell Grants and processes Pell Grant advances; processes ISIR suspension lists.

5. Generates financial aid letters, reports and lists; prepares and processes a variety of correspondence and documentation; maintains applicant and student financial aid files and documentation.

OTHER DUTIES
1. Performs administrative and clerical duties to assist Counselors as needed.

2. Assists with District financial aid outreach activities as assigned.

QUALIFICATIONS

Knowledge of:
1. Federal, state and local financial aid programs and regulations.

2. Applicable sections of State Education Code and other applicable laws.

3. Policies, objectives and technical aspects of financial aid programs and activities.

4. District organization, operations, policies and objectives pertaining to student admissions and financial aid.

5. Financial and statistical recordkeeping techniques.

6. Principles and techniques of student interviewing and counseling.
7. Administrative practices and procedures, including record keeping and filing practices and procedures.

8. Modern office methods, practices and equipment.


10. Basic math.


**Ability to:**

1. Interpret rules, regulations and policies regarding financial aid programs and awards and determine student eligibility.

2. Perform financial and statistical recordkeeping duties for a variety of federal and state financial aid programs.

3. Relate effectively to students with economically deprived backgrounds.

4. Analyze situations accurately and adopt an effective course of action.

5. Organize, set priorities and exercise sound independent judgment within areas of assigned responsibility.

6. Interpret, apply, explain and reach sound decisions in accordance with District policies and federal, state and local regulations and requirements.

7. Communicate clearly and effectively, both orally and in writing.

8. Prepare clear, concise and accurate reports, correspondence and other written materials.

9. Operate a computer using word processing and other business software and other standard office equipment.

10. Organize and maintain specialized files.

11. Maintain confidentiality of District files and records.

12. Exercise tact and diplomacy in dealing with sensitive, complex and confidential personnel issues and employee situations.

13. Establish and maintain effective working relationships with District management, staff, students, parents and others encountered in the course of work.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from high school or G.E.D. equivalents; completion of some college-level coursework in business, accounting, social services or a related field; and three years of progressively responsible clerical and
administrative support experience, including extensive public contact and customer service; or an equivalent combination of training and experience.

**Licenses; Certificates; Special Requirements:**
A valid California driver’s license and the ability to maintain insurability under the District’s vehicle insurance policy.

**PHYSICAL AND MENTAL DEMANDS**
The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**
While performing the duties of this job, the employee is regularly required to sit; talk or hear, both in person and by telephone; use hands to finger, handle and feel computers and standard business equipment; and reach with hands and arms. The employee is frequently required to stand and walk.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Mental Demands**
While performing the duties of this class, the incumbent is regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve complex problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with District management, staff, students, parents and others encountered in the course of work.

**WORK ENVIRONMENT**
The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions, and the noise level is usually quiet.