STATE CENTER COMMUNITY COLLEGE DISTRICT
FINANCIAL AID ASSISTANT II

DEFINITION

Under direction, assists with the planning, coordination, implementation and delivery of financial aid services and programs as well as assisting students, parents, and the public in applying for financial aid and utilizing financial aid services and programs.

SPECIAL CONDITIONS

Some positions may require the ability to communicate in a language other than English.

DISTINGUISHING CHARACTERISTICS

This classification performs lead and other difficult and complex duties in accordance with general instructions or established procedures. The Financial Aid Assistant II, compared to the Financial Aid Assistant I, assumes increased responsibility for and knowledge of financial aid regulations, processing, and decision making.

EXAMPLES OF DUTIES

Performs a wide variety of duties including, but not limited to:

- Assists with the planning, implementation and coordination of Financial Aid services and programs.
- Leads, trains, assigns, and monitors the work of Financial Aid Assistant I’s and clerical support staff.
- Analyzes and resolves disputes, appeals, and other issues that could not be resolved by staff at lower levels.
- Prepares and schedules counter hours for the Financial Aid Assistant I’s and phone hours for clerical support staff.
- Provides information, assistance, and advice to students, parents, and the public throughout the financial aid process.
- Interviews students regarding financial aid requirements.
- Analyzes student need through recognized needs analysis techniques.
- Evaluates financial aid applications and supporting documents for accuracy, clarity and completeness according to federal and state rules and regulations to determine eligibility for financial aid.
- Analyzes and determines student awards based on individual student characteristics and other related factors.
- Uses professional judgment to approve or deny eligibility in the event of special conditions, dependency overrides, or student appeals.
- Prepares financial aid award packages.
- Reviews student enrollment/registration prior to making payment to ensure proper coursework.
- Monitors students’ academic progress to evaluate initial and continued financial aid eligibility.
- Places administrative holds due to failure to meet academic requirements for financial aid.
- Schedules, organizes and conducts training and dissemination meetings with college and community groups and organizations.
- Ensures proper communication and compliance with District policies and procedures.
- Interprets and implements federal and state guidelines with respect to financial aid programs and services.
- Plans, schedules, and implements outreach activities.
- Develops and distributes processing and outreach materials.
• Organizes, participates and conducts financial aid orientation, outreach programs and workshops for current and prospective students, as well as the public, to explain financial aid regulations, requirements and application procedures.
• Reconciles records and collects data and statistics to prepare complex statistical and narrative reports for internal and state/federal agency use.
• Conducts research on financial aid related topics.
• Composes correspondence regarding financial aid issues.
• Analyzes financial aid statistical reports.
• Performs other duties as assigned.

EMPLOYMENT STANDARDS

Education:

• Baccalaureate degree.

Licenses/Certificates:

• Valid Driver’s License is required

Experience:

• Responsible experience in determining eligibility for postsecondary student financial aid and working with a diverse clientele.

Knowledge:

• Knowledge of federal, state, local and institutional rules and regulations governing financial aid in order to provide assistance.
• Knowledge of student financial aid needs analysis.
• Knowledge of financial aid programs and scholarship assistance programs available to students.
• Knowledge of principles and techniques of student advising and interviewing in order to provide proper assistance.
• Knowledge of record keeping and report preparation techniques to ensure reports are prepared in a timely manner.

• Knowledge of customer service principles in order to appropriately interact with students, staff, faculty, and the public.

• Knowledge of proper English spelling, grammar, and punctuation to compose items such as correspondence and/or reports.

• Knowledge of basic math including addition, subtraction, multiplication and division.

• Knowledge of current computer software applications and office productivity software such as word processing, spreadsheets, calendar, presentation, and database programs.

• Knowledge of current computer operating systems.

Skills:

• Skill to organize and maintain the efficient operation of the Financial Aid office.
- Skill to employ mathematical techniques for the purpose of analyzing statistical reports.
- Skill to research, analyze data and prepare reports.
- Skill to prepare work activities, schedules, and resource utilization to ensure office tasks are properly prioritized.
- Skill to operate standard office equipment such as computers, fax machines, copy machines, telephones, and others.
- Skill to rapidly learn and acquire skills in areas and technologies not previously assigned.
- Skill to use, understand and interpret student financial aid needs analysis.
- Skill to interpret and apply college and district policies and procedures.
- Skill to communicate technical information to individuals and groups with limited technical background.
- Skill to communicate with individuals for whom English is not a primary language.
- Skill to learn federal and state regulations and its terminology in order to communicate information.
- Skill to learn and maintain confidentiality of sensitive information and records.
- Skill to assign, monitor and review the work of other employees and students.
- Skill to appropriately interact with students, staff, faculty and public.
- Skill to receive and follow instructions.
- Skill to build and maintain effective working relationships.

Abilities:

- Ability to operate computers and their peripherals.
- Ability to use current common software applications.
- Ability to accurately enter and retrieve data.
- Ability to maintain consistent, punctual and regular attendance.
- Ability to lift and carry office supplies and equipment weighing up to 27 lbs.

Working conditions which may occur:

- Work inside protected from the weather.
- Noise exposure under 65 decibels, roughly that of a normal conversation or a ringing telephone.
- Some overtime and/or schedule changes may occur.
- May be required to travel to locations other than assigned site.
Examples of physical ability requirements necessary to perform the above job duties:

- Have coordinated, precise movement of the fingers of one or both hands to perform tasks such as typing, writing and taking notes. (Finger Dexterity)
- See clearly objects and close surroundings that are 36 inches or closer to perform tasks such as looking at computer monitors. (Near Visual Acuity)
- See clearly objects and close surroundings that are six feet or further away such as being able to see other vehicles while driving. (Far Visual Acuity)
- Distinguish between shades of one color or the difference between two or more colors such as working with computer monitors and filing systems. (Color Discrimination)
- Hear and understand human speech in a relatively quiet environment such as hearing someone speak in quiet office or library setting. (Speech Intelligibility in Quiet)
- Hear and understand human speech in a relatively noisy environment such as hearing someone speak to you while in the presence of loud equipment. (Speech Intelligibility in Noise)

Examples of mental ability requirements necessary to perform the above job duties:

- Listen to and understand information and ideas presented through spoken words and sentences. (Oral Comprehension)
- Come up with unusual or clever ideas about a given topic or situation, or to develop creative ways to solve a problem. (Originality)
- Arrange things or actions in a certain order or pattern, according to a specific rule or set of rules such as patterns of numbers, letters, words, or pictures. (Information Ordering)
- Identify or detect a known pattern, such as a figure, object, word, or sound that is hidden in other distracting material. (Flexibility of Closure)
- Generate or use different sets of rules for combining or grouping things in different ways. (Category Flexibility)
- Focus on a single source of sound in the presence of other distracting sounds. (Auditory Attention)
- Quickly make sense of, combine, and organize information into meaningful patterns. (Speed of Closure)
- Concentrate on a task over a period of time without being distracted. (Selective Attention)
- Shift back and forth between two or more activities or sources of information; multi-task to work on different projects simultaneously. (Time sharing)
- Remember information such as words, numbers, pictures, and procedures. (Memorization)
- Clearly communicate information and ideas through spoken words so others will understand. (Oral Expression)
- Identify and understand the speech of another person. (Speech Recognition)
- Recognize when something is wrong or is likely to go wrong. (Problem Sensitivity)
- Combine pieces of information to form general rules or conclusions such as finding a relationship among seemingly unrelated events. (Inductive Reasoning)
- Apply general rule, a premise, which is known to be true to specific problems to produce answers that make sense. (Deductive Reasoning)
- Read and understand information and ideas presented in writing. (Written Comprehension)
- Communicate information and ideas in writing so others will understand. (Written Expression)
Salary Range: 60