



For the future of every student

## **CLASS TITLE: FINANCIAL AID TECHNICIAN**

### **BASIC FUNCTION:**

Under the direction of the Assistant Principal, perform a variety of technical duties involved in determining student eligibility and assisting students with applying for financial aid; distribute, explain, collect, review, verify, process and evaluate financial aid forms, applications and documents; prepare, maintain and update related records, reports and files.

### **REPRESENTATIVE DUTIES:**

#### **ESSENTIAL DUTIES:**

Assist Adult Education students with applying for financial aid; distribute, explain and assist students with completing forms and applications as needed; interview students to determine eligibility for financial aid; evaluate applicant information to determine eligibility status; distribute and explain a variety of informational materials to students.

Receive, review, process and verify accuracy and completeness of financial aid forms, applications and documents for Adult Education students; identify and correct application errors as needed; review student qualifications, verify income, calculate fees and determine eligibility for financial aid.

Process and review student aid reports after the application process; calculate and determine loans, grants and other financial aid available to students; process voucher forms and initiate student payments; calculate, verify and prepare quarterly reports required by federal financial aid agencies.

Prepare and maintain a variety of financial, statistical and narrative records, logs and reports related to students, applications, distributed funds, payments, loans, grants, enrollment, eligibility and assigned duties; establish and maintain student files; maintain and update student eligibility lists.

Research, assemble, verify and compile a variety of student data and information; verify loan limits, selective service registration, dependency status and other required information; prepare and process verification forms and documents.

Monitor, evaluate and follow up on student academic and attendance progress to verify continued eligibility for financial aid; review student progress reports; identify and notify students, clients, administrators and loan funding agencies of student eligibility issues and problems.

Input and update student, application and a variety of other data in an assigned computer system; establish and maintain various automated records and files; initiate queries and generate a variety of computerized documents and reports; assure accuracy of input and output data.

Serve as a technical resource to students, personnel and others concerning financial aid functions; respond to inquiries and provide information concerning related forms, applications, guidelines, payments, requirements, rules, regulations, standards, policies and procedures.

Perform mandatory student loan entrance and exit interviews; explain related promissory notes, attendance policies and procedures, deferments, forbearances, repayment plans, default management, materials, and related processes and requirements.

Serve as a liaison between students, personnel, administrators, vocational counselors, outside agencies, governmental organizations and the public concerning financial aid services; assist students with resolving financial aid application and eligibility issues, conflicts and discrepancies.

Compose, distribute and respond to a variety of correspondence; prepare, type and update forms, policies, procedures and informational pamphlets for students receiving financial aid as directed; duplicate and distribute various materials.

Communicate with District personnel, students and various outside agencies to exchange information and resolve issues or concerns.

Operate a variety of office equipment including a copier, fax machine, computer and assigned software.

Advise students in the job search and employment process as directed.

Attend and participate in various meetings and in-services as assigned.

**OTHER DUTIES:**

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

General terminology, practices and procedures related to financial aid programs and services.

Interviewing and advisement techniques.

Basic practices and procedures involved in determining student eligibility for financial aid.

Oral and written communication skills.

Interpersonal skills using tact, patience and courtesy.

General methods, procedures and terminology used in clerical accounting work.

Methods of collecting and organizing data and information.

Correct English usage, grammar, spelling, punctuation and vocabulary.

Operation of a computer and assigned software.

Financial and statistical record-keeping techniques.

Preparation of financial statements and comprehensive reports.

Data control procedures and data entry operations.

Mathematic calculations.

**ABILITY TO:**

Perform a variety of technical duties involved in determining student eligibility and assisting students with applying for financial aid.

Distribute, explain, collect, review, process and verify accuracy and completeness of financial aid forms and applications.

Interview students and evaluate related information to determine eligibility for financial aid.

Learn, interpret, apply and explain rules, regulations, policies and procedures.

Learn policies and objectives of assigned programs and activities.

Monitor, evaluate and follow up on student academic and attendance progress and eligibility status.

Serve as a technical resource to students and staff concerning financial aid.

Perform arithmetic calculations with speed and accuracy.

Type or input data at an acceptable rate of speed.

Meet schedules and time lines.

Operate a computer and assigned software.

Establish, maintain and update student records and files.

Compile and verify information and prepare reports.

Communicate effectively both orally and in writing.

Establish and maintain cooperative and effective working relationships with others.

Maintain regular and consistent attendance.

#### **EDUCATION AND EXPERIENCE:**

Any combination equivalent to sufficient experience, training and/or education to demonstrate the knowledge and abilities listed above. Typically, this would be gained through: graduation from high school supplemented by college-level course work in business, accounting, social services or related field and two years experience working with financial aid, eligibility, social service or related functions.

#### **WORKING CONDITIONS:**

##### **ENVIRONMENT:**

Office environment.

##### **PHYSICAL DEMANDS:**

Dexterity of hands and fingers to operate a computer keyboard.

Seeing to read a variety of materials.

Hearing and speaking to exchange information.

Sitting for extended periods of time.