

**San Jose · Evergreen Community College District
Classified Job Description**

Position: Financial Aid Specialist I

Department: Financial Aid

Location: Evergreen Valley or San Jose City College

Date: October 5, 2016

POSITION PURPOSE

Under the direction of Financial Aid administrator, interview and assist students applying for financial aid; preliminarily assess financial need and provide students with an overview of requirements for program eligibility for work study, loans, grants and scholarships.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Specialist I performs a variety of tasks involved in assisting students who apply for financial aid. Incumbents typically assist students at the counter or by phone in applying for various financial aid programs and assist other Specialists while learning financial aid programs. This differs from the Financial Aid Specialist II in that the latter serves in a specialized capacity for computer systems and/or specific program management.

KEY DUTIES AND RESPONSIBILITIES:

1. Assist students in applying for various types of Federal, State and other financial aid programs and resources; interview students at the counter and assist students in completing financial aid applications.
2. Verify application information and supporting documentation using predetermined methods; identify financial need as required; assure completeness of documents at counter.
3. Explain Federal, State and District regulations, requirements, policies and procedures with regard to a wide range of financial aid programs to students, faculty and staff.
4. Identify financial needs of students, faculty and staff and direct them to appropriate resources on campus and online materials.
5. Assist in performing needs analysis; direct students to online award letters using institutional software.
6. Evaluate and determine fee waivers based on student eligibility.
7. Maintain current knowledge of State and Federal financial aid programs; attend meetings, workshops and conferences regarding changes in eligibility requirements, application procedures and related issues.
8. Prepare and maintain a variety of records, files, and reports related to financial aid activities; may assist in compiling and maintaining statistical data for inclusion in State and Federal reports.
9. Assist other Financial Aid Specialists on specific programs as assigned.
10. Operate a variety of office equipment and machines including computers, peripheral equipment, calculators and copiers
11. Perform other duties reasonably related to the job classification.

EMPLOYMENT STANDARDS

Knowledge of:

1. Federal, State and local student financial aid programs regulations and guidelines.
2. Financial problems encountered by college students and parents.
3. Financial and statistical record-keeping techniques.
4. Modern office practices, procedures and equipment.
5. Correct English usage, grammar, spelling, punctuation and vocabulary.
6. Oral and written communication skills.

Skills and Ability to:

1. Work with students/parents from a variety of diverse backgrounds and cultures.
2. Learn rules, regulations, procedures, policies and functions of Federal, State and District financial aid programs.
3. Read, interpret, apply and explain policies, procedures and regulations regarding financial aid programs.
4. Determine eligibility for financial aid through need analysis.
5. Operate office machines including a computer and applicable software.
6. Must be able to perform business math computations and maintain accurate financial records.
7. Work independently with little direction.
8. Communicate effectively both orally and in writing.
9. Establish and maintain cooperative and effective working relationships with and effectively serve students.

Experience and Education:

1. Graduation from high school supplemented by college course work in business, accounting, social services or related field.
2. Two years of increasingly responsible clerical experience involving financial record-keeping and public contact in a services-oriented environment.
3. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socioeconomic, gender, cultural, disability, and ethnic backgrounds of the individuals we serve and sensitivity to and knowledge and understanding of groups historically underrepresented, and groups who may have experienced discrimination.

WORKING CONDITIONS

Environment:

1. Typical office environment.
2. Constant interruptions.

Physical Demands:

1. Sitting and operating a keyboard to enter data into a computer terminal for extended periods of time.
2. Hearing and speaking to exchange information in person or on the telephone.
3. Moderate lifting.
4. Bending.
5. Reaching to retrieve and file records.

Board Approved: 12/04/90, 04/06/00, 10/4/16

Salary Range: 66

EEO Category: 2B4 – Clerical/Secretarial