

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

Position: Financial Aid Specialist II

Department: Financial Aid

Location: Evergreen Valley or San Jose City College

Date: 6/22/2017

POSITION PURPOSE

Under the direction of a Financial Aid Officer, perform one or more highly specialized functions involving computerized financial aid records or overall coordination of a designated program.

DISTINGUISHING CHARACTERISTICS

In addition to having knowledge of all aspects of application processing and related procedures done at the Financial Aid Specialist I level, the Financial Aid Specialist II serves in a specialized capacity for computer systems and/or responsibility for a specific financial aid program such as FWS or PELL Reporting. This level differs from the Financial Aid Specialist III in that the latter serves in a lead capacity in the office, oversees the other specialists in the absence of the Financial Aid Officer, performs final review of applications and supporting documentation, packages financial aid awards, and exercises professional judgment on individual circumstances.

KEY DUTIES AND RESPONSIBILITIES:

1. Review applications and required documentation to determine financial need and program eligibility for a variety of Federal, State and District programs.
2. Perform technical duties related to departmental computer systems; implement, test and debug program changes; assist in determining packaging parameters; manage electronic data exchange process required for transmission of data; process student files.
3. Participate in the file packaging process and the process involved in one or more assigned specific programs such as work study, grants, scholarships and others as assigned.
4. Prepare Federal and State reports which initiates funding levels for financial aid programs; assist Financial Aid Specialists III as needed.
5. Provide second verification of application information and supporting documentation; make corrections appropriately.
6. Interview and counsel students and parents concerning budget cost of education, applications and eligibility; interpret and explain Federal, State and District regulations, requirements, policies and procedures.
7. Perform needs analysis and assist in packaging students for financial aid programs; enter and revise data in the computer; generate, file and distribute award letters and related documents.
8. Maintain current knowledge of State and Federal financial aid programs; attend meetings, workshops and conferences regarding changes in eligibility requirements, application procedures and other issues.
9. Complete documents/information requested from outside agencies and other institutions.
10. Communicate with various District departments and personnel, governmental and private agencies, other colleges, financial institutions and the public.

11. Prepare and maintain a variety of records, files and reports related to financial aid activities; compile and maintain statistical data for inclusion in State and Federal reports.
12. Operate a variety of office equipment and machines including computers, peripheral equipment, calculators and copiers.
13. Perform other duties reasonably related to the job classification.

EMPLOYMENT STANDARDS

Knowledge of:

1. Rules, regulations, procedures, policies and function of Federal, State and District financial aid programs.
2. Methods and techniques of financial aid need analysis.
3. Financial aid packaging methods and procedures.
4. Interpersonal skills using tact, patience and courtesy.
5. Interviewing and counseling techniques.
6. Personal and financial problems encountered by college students and parents.
7. Financial and statistical record-keeping techniques.
8. Modern office practices, procedures and equipment.
9. College and community resources for students.
10. Computer software used for financial aid processing.

Skills and Ability to:

1. Work with students/parents from a variety of diverse backgrounds and cultures.
2. Determine eligibility for financial aid through needs analysis.
3. Assist in the development of financial aid packages to meet financial need.
4. Read, interpret, apply and explain rules, regulations, policies and procedures.
5. Exercise sound judgment in reviewing and evaluating student financial aid applications.
6. Interpret financial statements, income tax forms and related documents.
7. Utilize computer software for extensive reporting, tracking and analysis.
8. Analyze situations accurately and adopt an effective course of action.
9. Add, subtract, multiply and divide quickly and accurately.
10. Communicate effectively both orally and in writing.
11. Maintain records and prepare reports.

12. Plan and organize work to meet schedules and time lines.
13. Establish and maintain cooperative and effective working relationships with others.
14. Interview and advise students.

Experience and Education:

1. Graduation from high school supplemented by college course work in business, accounting, social services or related field.
2. Three years of increasingly responsible experience involving financial record-keeping and public contact in a social services related field, including at least two years of financial aid experience.
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: reformat
Salary Range: 76
EEO Category: 2B3 – Technical/Para-Professional