

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

**Position:** Financial Aid Specialist III

**Department:** Financial Aid

**Location:** Evergreen Valley or San Jose City College

**Date:** 3/30/2017

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**POSITION PURPOSE**

Under the direction of a Financial Aid Officer, assign and review financial aid packages prior to their submittal, serve as a technical resource in the financial aid office for other Specialists and oversee the office in the absence of the Financial Aid Officer; perform specialized financial aid functions on an on-going basis in support of the overall program including loan packaging, and awarding, and Veterans' Program activities.

**DISTINGUISHING CHARACTERISTICS**

The Financial Aid Specialist III serves in a lead capacity in the office, and oversees the other Specialists in the absence of the Financial Aid Officer, performs final review of application and supporting documentation; packages financial aid awards, exercises professional judgement on individual circumstances and makes adjustments accordingly. This level differs from the Financial Aid Specialist II as the latter serves in a specialized capacity in terms of computer systems and/or responsibility for a specific financial aid program such as FWS or PELL Reporting.

**KEY DUTIES AND RESPONSIBILITIES:**

1. Oversee the Financial Aid Office in the absence of the Financial Aid Officer.
2. Provide work direction and guidance to other Financial Aid Specialists; respond to technical questions and assist in training of new personnel; provide direction to student workers.
3. Assist students in applying for various types of Federal, State and other financial aid programs and Veterans benefits.
4. Provide final review of applications and required documentation to determine financial need and program eligibility for a variety of Federal, State and District programs and award/package aid including loans.
5. Interview veterans for benefit eligibility; prepare and maintain all documentation and files for program audits.
6. Recalculate financial need as required; evaluate special circumstances to override need analysis results and increase or decrease awards.
7. Refer students to other District or community resources as appropriate.
8. Provide information and assistance to students and parents regarding financial aid programs, applications and eligibility; interpret and explain Federal, State and District regulations, requirements, policies and procedures.
9. Participate in the student petition process and in evaluating cases requiring professional judgment.
10. Monitor continued eligibility of students; evaluate and monitor satisfactory academic progress; amend student awards according to changes; coordinate outside sources of assistance.

11. Interview and counsel students and parents concerning cost of education, program requirements and recommend resources and courses of action as appropriate.
12. Perform technical duties related to departmental computer systems; implement, test and debug program changes; assist in determining packaging parameters.
13. Perform needs analysis and package students for financial aid programs; enter and revise data in the computer; generate, file and distribute award letters.
14. Communicate with various District departments and personnel, governmental and private agencies, other colleges, financial institutions and the public.
15. 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.
16. 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.
17. 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. Direct Department activities in the absence of the supervisor.
3. Determine eligibility for financial aid through needs analysis.
4. Develop financial aid packages to meet financial need.

5. Read, interpret, apply and explain rules, regulations, policies and procedures.
6. Exercise sound judgment in reviewing and evaluating student financial aid applications.
7. Interpret financial statements, income tax forms and related documents.
8. Utilize computer software for extensive reporting, tracking and analysis.
9. Analyze situations accurately and adopt an effective course of action.
10. Add, subtract, multiply and divide quickly and accurately.
11. Communicate effectively both orally and in writing.
12. Maintain records and prepare reports.
13. Provide work direction and guidance.
14. Plan and organize work to meet schedules and time lines.
15. Work independently with little direction.
16. Establish and maintain cooperative and effective working relationships with others.
17. Relate effectively to economically disadvantaged students.
18. Interview and advise students.
19. Handle difficult situations with tact and diplomacy.

**Experience and Education:**

1. An Associate's degree supplemented by college course work in business, accounting, social services or related field.
2. Four years of increasingly responsible experience involving statistical and financial record-keeping and public contact in a social services related field, including at least three 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: 86

EEO Category: 2B3 – Technical/Para-Professional