

FINANCIAL AID OFFICER

DEFINITION

Under direction of assigned supervisor/manager, using a variety of financial aid systems and applications, administers federal and state student financial assistance including but not limited to grants, loans, scholarships, Federal Work-Study, and consortium agreements, employing extensive knowledge and understanding of financial aid programs and regulations. Acts as a technical lead to Financial Aid Office staff.

TYPICAL DUTIES

Maintains awareness of current trends and legislative activity having financial aid impact; interprets and implements federal rules and regulations required for student aid; and identifies and allocates available resources; conducts individual and group entrance and exit loan counseling sessions and informational workshops; conducts individual advising sessions regarding debt management; explains financial aid policies, procedures and regulations to enrolled and prospective students; and conducts interviews and advises students seeking financial aid; assesses students' and prospective students' financial needs; performs needs analyses, using applicable financial aid software systems and programs; enters selection criteria using the financial aid software system; determines students' eligibility for financial aid; reviews, completes and processes student loan applications; coordinates and packages financial aid for applicants; conducts review of aid packages for satisfactory progress for continued eligibility, and monitors compliance with financial award conditions; reviews and determines student eligibility for appeals, consortium requests, special circumstances, and dependency override requests; administers federal and state student assistance grants, scholarships, and consortium agreements; completes Bureau of Indian Affairs applications; operates a variety of internal systems including student administration software, document imaging, and related programs and applications; maintains record keeping and data management systems; analyzes data and creates and generates reports from existing database using a financial aid system to determine awards; coordinates the scholarship program with donors and recipients; develops written and electronic publications for financial aid programs and services; expands outreach efforts to diverse populations and supports recruitment objectives by working with appropriate college departments and public interest agencies; performs related duties as required.

QUALIFICATIONS

EXPERIENCE

Three years of experience performing related duties.

One year of experience is equal to 12 months of experience at 40 hours per week. Applicable part-time experience will be converted to the full-time equivalent for purposes of meeting the experience requirement.

EDUCATION

Bachelor's degree from an accredited college or university in business, psychology, social service or related fields. (Additional qualifying experience may be substituted for up to two years of the required education on a year-for-year basis.)

One year of education is equal to 30 semester units. Education must be from an accredited institution.

KNOWLEDGE OF

Applicable federal, state and local laws, policies and regulations, and office processes and procedures; personal and financial problems of disadvantaged students; modern office practices, procedures and equipment; administrative and clerical procedures and systems, such as filing and recordkeeping techniques in a complex business environment; effective customer service skills; how to compose effective correspondence; the structure and content of the English language including the meaning and spelling of words, rules of composition and grammar, and rules for letter and report writing; principles and practices of effective communication; how to train others to perform specific tasks; numbers, their operations, and interrelationships, including arithmetic at the level required to effectively perform the duties of the position; basic principles of leadership, oversight and training.

ABILITY TO

Perform the essential functions of the position; sustain regular work attendance; work cooperatively and effectively with the public, students, faculty and staff; exercise initiative and mature judgment; interpret and applies applicable federal, state and local laws, policies and regulations, and office processes and procedures; work as a member of a team; meet schedules and timelines; manage one's own time and the time of others; correctly follow a given rule or set of rules in order to arrange things or actions in a certain order; understand and effectively carry out oral and written directions; effectively communicate information and ideas orally and in writing based on the needs of the audience; read, write and perform mathematical calculations at the level required for successful job performance; be aware of others' reactions and adjust interpersonal skills accordingly; handle personal and private information with discretion; prepare routine correspondence independently; effectively learn and operate equipment and software related to the duties of the position; use technology to effectively perform responsibilities, such as word processing, spreadsheets, databases, and desktop publishing; type/enter data at a speed proficient to complete the duties of the position in a timely manner; adapt to changing technologies; work successfully with diverse populations; effectively train, assign and oversee the work of others.

TYPICAL EQUIPMENT USED (May include, but not limited to)

Current office technologies such as computers, printers, telephones and copiers; other equipment common to the field to which the position is assigned.