

## **FINANCIAL AID TECHNICIAN**

### **DEFINITION**

Under the supervision of the assigned supervisor/manager, this position performs a variety of complex tasks requiring extensive knowledge of policies, rules and procedures pertaining to financial aid.

### **TYPICAL DUTIES**

Supplies information and advice to students seeking financial aid, and directs applicants to appropriate staff after reviewing their needs; assists students in determining their budgets; helps students fill out financial aid applications, and checks applications for completeness; makes adjustments to monetary amounts during awards process; provides applications for outside scholarships, and reviews progress; generates reports from database using financial aid software or similar system to run needs analysis and package student financial aid; sets up and maintains individual student records; composes correspondence, forms and reports; oversees the work of temporary classified staff; completes service work requests, requisitions, purchase orders, maintenance and supply requisitions, and related documents; processes receipts for student loan checks and assists at the front counter; explains forms of financial assistance available to students; participates in in-reach and outreach student events; serve as liaison to other student services departments; conducts presentations on financial aid processes; advises students seeking financial aid; issues and explains verification forms and supportive documents; corresponds with students to obtain documentation; completes student loan applications, student time sheets and other related documents; reviews and processes financial aid awards for students; records financial transactions and other account information to update and maintain accounting records; reviews and confirms students' satisfactory progress; performs audits on student eligibility and takes appropriate action; serves as lead to other financial aid clerks; advertises and updates information on outside scholarships; composes award information, memorandums and reports. Performs related duties as required.

### **QUALIFICATIONS**

#### **EXPERIENCE**

Three years of clerical experience related to the duties of the position.

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

#### **EDUCATION**

One year of college course work at an accredited institution may be substituted for one year of the required experience.

One year of education is equal to 30 semester units.

**KNOWLEDGE OF**

Applicable federal, state and local laws, policies and regulations, and office processes and procedures; 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; interprets 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.

**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.