



TITLE	CLASSIFICATION	SALARY GRADE/ASSIGNMENT
FINANCIAL AID TECHNICIAN II	CLASSIFIED	GRADE: K MONTHS:
BOARD POLICY REFERENCE: 2008/2009 CLASSIFICATION REVIEW		Board Approved: 08/11/09

JOB DESCRIPTION:

Under general supervision, assist students in securing financial aid; communicate as directed with Federal, State, and local agencies which provide financial assistance to students; advise students on aid applications, planning, resources, money management and available sources of aid and the process to qualify; enter data into various computer systems; and perform related work as required.

SCOPE:

The Financial Aid Technician II is fully knowledgeable of financial aid guidelines and procedures; evaluates and determines the student eligibility for financial aid programs; may use professional judgment to approve or deny eligibility in the event of special conditions, dependency overrides, or student petitions.

DISTINGUISHING CHARACTERISTICS:

The Financial Aid Technician II is distinguished from the Financial Aid Technician I by the increased responsibility of calculating repayments and approving or denying special conditions and confirming aid eligibility according to federal verification regulations.

KEY DUTIES AND RESPONSIBILITIES:

Examples of key duties are interpreted as being descriptive and not restrictive in nature.

1. Provides accurate information regarding state and federal financial aid resources and program requirements.
2. Evaluates financial aid applications and supporting documents for accuracy, clarity and completeness according to federal and state rules and regulations to determine basic eligibility for financial aid.
3. Verifies financial information reported on financial aid applications and additional documents; performs needs' analysis.
4. Recommends financial aid award packages.
5. Prepares and mails financial aid tracking and award letters.
6. Calculates and monitors students' academic progress to evaluate initial and continued financial aid eligibility.
7. Processes applications for programs such as BOG fee waiver, grants, and emergency loans.
8. Places administrative holds or advises students of need to submit petitions and long-term educational plans due to failure to meet academic requirements for financial aid.
9. May make presentations to students and parents regarding financial aid availability and process.
10. Reviews enrollment prior to payment to ensure proper coursework.

KEY DUTIES AND RESPONSIBILITIES (Continued):

11. Calculates repayments or refunds and post-withdrawal disbursements for students or District.
12. Approves or denies special conditions, dependency overrides, student petitions and consortium agreements with other colleges to establish full aid packages to part-time students attending multiple institutions.

EMPLOYMENT STANDARDS

ABILITY TO:

Analyze the financial needs of students to determine their financial aid eligibility; apply financial aid eligibility criteria in a fair, consistent and objective way; prepare clear and concise reports; compile and analyze data concerning projected student financial assistance; maintain cooperative working relationships; maintain a confidential work environment; work under strict deadlines; multi-task with interruptions and transition from one task to another; provide financial aid information to students and parents; demonstrate sensitivity to, and respect for a diverse population.

KNOWLEDGE OF:

Federal and state programs that provide financial assistance to students; interviewing techniques; relevant federal, state and local laws, rules, and regulations; federal reconciliation processes and reporting processes; operation of personal computer software programs designed specifically for financial aid processes; word processing, spreadsheet and a relational database.

Preferred additional knowledge: Knowledge of needs' analysis, financial aid packaging, fee waivers, verification procedures, return to Title IV calculations, satisfactory academic progress (SAP) and student eligibility guidelines.

MINIMUM QUALIFICATIONS:

Candidates/incumbents must meet the minimum qualifications as detailed below, or file for equivalency. Equivalency decisions are made on the basis of a combination of education and experience that would likely provide the required knowledge and abilities. If requesting consideration on the basis of equivalency, an Equivalency Application is required at the time of interest in a position (equivalency decisions are made by Human Resources, in coordination with the department where the vacancy exists, if needed.)

Education:

Associate's degree with related coursework.

Experience:

Increasingly responsible financial aid experience.