



TITLE	CLASSIFICATION	SALARY GRADE
FINANCIAL AID PROGRAM SPECIALIST	CLASSIFIED	GRADE: N
BOARD POLICY REFERENCE:		2015/16 Classification Review

JOB DESCRIPTION:

Under general supervision, coordinate operations of the Pell Grant and/or Federal Student Loan Programs; advise and assist students with financial aid processes; perform accounting work in connection with the maintenance of student financial aid records; reconcile the Pell Grant and/or Federal Student Loan Programs; serve as a lead worker to Financial Aid Technicians.

SCOPE:

The Financial Aid Program Specialist applies professional judgment, financial aid regulations and loan guidelines to determine student eligibility; coordinates the Return to Title IV process; reconciles the Pell Grant and/or Federal Student Loan Programs; evaluates special conditions, various types of appeals/extensions and other agreements according to judgment.

DISTINGUISHING CHARACTERISTICS:

The Financial Aid Program Specialist is distinguished from other Financial Aid classifications by the in-depth knowledge of Financial Aid programs, regulations and procedures as exemplified by the duties listed below and by the responsibility for reporting repayments, approving and denying loan requests and/or reconciliation work done for the Pell Grant and/or Federal Student Loan Programs. This classification also serves as a lead worker to other classified staff in the area.

KEY DUTIES AND RESPONSIBILITIES:

Examples of key duties are interpreted as being descriptive and not restrictive in nature. Incumbents routinely perform approximately 80% of the duties below.

1. Evaluates and processes financial aid applications to perform needs' analysis for determining student eligibility for various aid programs including student loans; approves or denies requests based on financial aid policies and procedures, and professional judgment.
2. Assists students with resolving financial issues related to meeting the cost of their education and provides students with information regarding Federal and State financial aid resources and program requirements; may provide financial planning guidance to students' for multi-year borrowing plans.
3. Certifies and processes loans through specialized financial aid software.
4. Interprets and implements Family Educational Rights and Privacy Act of 1974 (FERPA) and Deferred Action for Childhood Arrivals (DACA) regulations.
5. Determines amount of loan funds to be requested; originates and disburses loan funds to eligible recipients.
6. Audits the work of Financial Aid Technicians; reviews packaged student files and award letters for accuracy; ensures corrections are made before information is provided to students.
7. Calculates and monitors students' academic progress to evaluate continued financial aid and loan eligibility; communicates with students and District faculty and staff regarding educational plans as they relate to financial aid eligibility.

KEY DUTIES AND RESPONSIBILITIES – Continued:

8. Verifies individual recipient disbursements to reconcile the Pell Grant and/or Federal Student Loan program on a continuing basis; resolves discrepancies between the Accounting Office, the Department of Education's Common Origination and Disbursement program, and the Financial Aid Office.
9. Reconciles and reports Pell Grant disbursements to the Department of Education during award year; researches and resolves discrepancies to student accounts; contacts other colleges to resolve potential over payments.
10. Oversees the timing and reporting of Return to Title IV calculations; reports payments, repayments and overpayments to the Common Origination and Disbursement Program and to the National Student Loan Data System; makes adjustments for refunds through the Federal Student Loan program.
11. Coordinates and presents loan default and responsible borrowing workshops.
12. Monitor students' educational plans to determine students' maximum eligibility for Subsidized and Unsubsidized Stafford Loans.
13. May serve as a lead worker to other classified staff in the area.
14. May hire, train and supervise student and short-term, non-continuing employees.

EMPLOYMENT STANDARDS

ABILITY TO:

Analyze the financial needs of students to determine their eligibility and ability for various State and Federal aid programs, eligibility, and ability to repay; apply loan default management guidelines in a fair, consistent and objective way; analyze and interpret statistical information on loan defaults and apply conclusions to loan program management; provide consumer information to students and parents in groups; provide effective customer service; perform detailed financial record keeping; maintain cooperative working relationships; maintain confidentiality; demonstrate sensitivity to, and respect for, a diverse population.

KNOWLEDGE OF:

Federal and State programs that provide financial assistance and loans to students; interviewing techniques; relevant Federal and State financial aid rules and regulations; Federal reconciliation processes and reporting processes; standard office productivity software and specialized systems; methods, practices and terminology used in financial record keeping.

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; Department of Education and National Student Loan Data System computer software.

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 in a related field.

Experience:

Increasingly responsible (2-4 years full-time equivalent) experience working with government and/or funded programs, specifically the Pell Grant or a Federal Student Loan program. Experience as a lead worker in a financial aid office preferred.