



TITLE	CLASSIFICATION	SALARY GRADE
FINANCIAL AID TECHNICIAN II	CLASSIFIED	GRADE: K
BOARD POLICY REFERENCE:		2015/16 Classification Review

**JOB DESCRIPTION:**

Under general supervision, assist students in securing financial aid; communicate 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.

**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 extensions for financial aid or appeals.

**DISTINGUISHING CHARACTERISTICS:**

The Financial Aid Technician II is distinguished from the Financial Aid Technician I by the increased knowledge of Federal and State financial aid regulations and procedures and responsibility of and accountability for 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. Incumbents routinely perform approximately 80% of the duties below.*

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. Interprets and implements Family Educational Rights and Privacy Act of 1974 (FERPA) and Deferred Action for Childhood Arrivals (DACA) regulations.
4. Researches and responds to questions from Counselors and others regarding extensions and comprehensive educational plans as they relate to financial aid eligibility.
5. Verifies financial and household information reported on financial aid applications and additional documents; performs needs' analysis.
6. Awards financial aid packages; reconciles awards.
7. Prepares and mails financial aid tracking and award letters.
8. Calculates and monitors students' academic progress to evaluate initial and continued financial aid eligibility.
9. Processes applications for programs such as Board of Governor's (BOG) fee waiver, grants, and emergency loans.
10. Places administrative holds or advises students of need to submit appeals, extensions and comprehensive educational plans due to failure to meet academic requirements for financial aid.
11. Participates in outreach efforts and make presentations to students and parents regarding financial aid availability and process.

**KEY DUTIES AND RESPONSIBILITIES – Continued:**

12. Reviews required unit enrollment and ensures proper coursework prior to payment disbursement.
13. Calculates repayments or refunds and post-withdrawal disbursements for students or District.
14. 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.
15. Trains other Classified staff in the area.
16. Trains and directs the work of student and short-term, non-continuing (STNC) employees.

**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; provide effective customer service; communicate in English, both orally and in writing; maintain a confidential work environment; work under strict deadlines; 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; standard office productivity software and specialized systems.

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 some related coursework.

*Experience:*

Increasingly responsible financial aid experience.

**LICENSE OR CERTIFICATE:**

This classification requires the use of a personal or District vehicle while conducting District business. Must possess a valid (Class C) California driver's license and an acceptable driving record.

**SPECIAL REQUIREMENTS:**

Ability to lift up to 50 lbs. unassisted.