



TITLE	CLASSIFICATION	SALARY GRADE
FINANCIAL AID TECHNICIAN - PETALUMA CAMPUS	CLASSIFIED	GRADE: J
BOARD POLICY REFERENCE: 2015/16 Classification Review		

JOB DESCRIPTION:

Under general supervision, assist students in securing financial aid; advise students on aid applications, planning, resources, money management and available sources of financial aid and the process to qualify; assist with coordination of student employment activities.

SCOPE:

The Financial Aid Technician - Petaluma Campus evaluates and determines student eligibility for financial aid programs; ensures completeness and accuracy of information in student files; advises students of the need to submit extensions for financial aid, appeals due to failure to meet academic requirements for financial aid; provides part-time job information to students and serves as a resource for the community and on-campus employers; assists with coordination of the daily support activities and operations of the First Stop Center.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Technician - Petaluma Campus is distinguished from the Financial Aid Technician I by working independently from the main financial aid processing center in Santa Rosa, and by the added responsibility of assisting in the coordination of the daily support activities and operations of the First Stop Center at the Petaluma Campus.

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 to students regarding State and Federal financial aid resources and program requirements.
2. Interprets and implements District policies and procedures, Family Educational Rights and Privacy Act of 1974 (FERPA) and Deferred Action for Childhood Arrivals (DACA) regulations.
3. Researches and responds to questions from Counselors and others regarding extensions and comprehensive educational plans as it relates to financial aid eligibility.
4. Provides accurate information to students regarding the availability of Student Employment on- and off-campus; explains the Federal Work Study award and placement process.
5. Evaluates financial aid applications and supporting documents for accuracy, clarity and completeness according to Federal and State rules and regulations to determine eligibility for financial aid.
6. Verifies financial and household information reported on financial aid applications and additional documents; performs needs' analysis.
7. Awards financial aid packages; 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. 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.
10. Processes applications for programs such as Board of Governor's (BOG) fee waiver, grants, and emergency loans.

KEY DUTIES AND RESPONSIBILITIES – Continued

11. Provides information regarding Student Employment Office services and activities.
12. Verifies students' timesheets for units and Federal Work Study eligibility.
13. Monitors Federal Work Study limit report (for Petaluma Campus) and notifies students' supervisors when limits have been met.
14. Participates in outreach efforts and make presentations in English (and Spanish preferred) to students and parents regarding financial aid availability and the process for applying for aid and student employment.
15. Reviews required unit enrollment prior to making payment to ensure proper coursework.
16. Updates and maintains digital student services resources, such as smart phone applications.
17. Supervises, trains and directs the work of student 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; compile and analyze data concerning projected student financial assistance; maintain cooperative working relationships; provide financial aid and student employment information to students and parents; maintain a confidential work environment; work under strict deadlines; provide effective customer service; communicate in English, both orally and in writing (bilingual English/Spanish preferred); demonstrate sensitivity to, and respect for, a diverse population.

KNOWLEDGE OF:

Federal and state programs that provide financial assistance to students; interviewing techniques; educational programs, policies and procedures; standard office productivity software and specialized systems.

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:

Graduation from high school; Associate's Degree preferred.

Experience:

Some (1-2 years full-time equivalent) general office experience. Some college or public contact experience in a financial or public service area preferred.