

TITLE: Financial Aid Program Specialist

CLASSIFICATION: Classified

SALARY GRADE: C10

SCOPE OF POSITION:

Under general direction, advises and assists students with financial aid processes. Processes financial aid applications and funding in compliance with applicable regulations. Reconciles amounts delivered between reporting entities. Provides support for operations of the Pell Grant and/or Federal Student Loan Programs. Performs accounting work in connection with the maintenance of student financial aid records. May serve as lead worker to other classified employees 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 Federal Direct Student Loan and alternative loan eligibility. Reviews student loan request(s) and concludes how student's academic progress and/or borrowing history may affect loan eligibility. Meets with and advises students to resolve any issues on loan request.
2. Organizes the timing and reporting of Return to Title IV calculations. Reports payments, repayments, and overpayments to the Common Origination and Disbursement Program (COD) and to the National Student Loan Data System. Makes adjustments for refunds through the Federal Student Loan program. Communicates with Accounting to ensure accurate reporting to student accounts.
3. Reconciles and reports Pell Grant and/or Federal Student Loan disbursements to the Department of Education during award year. Researches and resolves discrepancies in student accounts. Researches institutional aid issued by other departments to resolve over awards. Communicates with other colleges to resolve potential over payments.
4. Evaluates, verifies, and processes financial aid applications to perform needs analysis for determining student eligibility, for various aid programs including student loans. Processes requests based on financial aid policies and procedures, and professional judgment.
5. Assists students with resolving financial issues related to qualifying criteria, overpayments, and meeting the cost of their education. Provides students with information regarding federal and state financial aid resources and program requirements. Provides financial planning guidance to students for multi-year borrowing plans.
6. Assists in verifying individual recipient disbursements to reconcile the Pell Grant and/or Federal Student Loan program. Resolves discrepancies between the Accounting Office, the Department of Education's Common Origination and Disbursement program, and the Financial Aid Office. Assists in troubleshooting and resolving rejected Pell and/or loan payments.
7. Conducts audit file processing. Reviews packaged files for accuracy. Reviews, updates, and makes corrections to financial aid records.
8. Identifies and resolves inaccurate data reported to the Common Origination and Disbursement Program or National Students Loan Data System (NSLDS).

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KNOWLEDGE OF:

1. Federal and state programs that provide financial assistance and loans to students.
2. Interviewing techniques.
3. Federal reconciliation processes and reporting processes.
4. Methods, practices, and terminology used in financial record keeping.
5. Relevant local, state, and federal rules and regulations, programs, policies and procedures.
6. Applicable technology usage, including standard office productivity software and other appropriate technology.

ABILITY TO:

1. Apply loan default management guidelines in a fair, consistent, and objective manner.
2. Analyze and interpret statistical information and apply conclusions. Provide consumer information to students and parents in groups.
3. Collaborate productively and cooperatively with individuals and groups both internally and/or externally.
4. Communicate effectively, both orally and in writing.
5. Exercise appropriate judgement in interactions with others and with work processes.
6. Interact with the public in a helpful, courteous, and professional manner.
7. Demonstrate sensitivity to, and respect for, a diverse population.

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 the supervising administrators, in coordination with the department where the vacancy exists, if needed.)

EDUCATION:

Associate degree required.

EXPERIENCE:

2+ years of experience working with government and/or funded programs, specifically the Pell Grant or a federal student loan program required.

SANTA ROSA JUNIOR COLLEGE COMMITMENT:

All classifications require a commitment to the District's Vision, Mission, Values, Goals and Objectives as articulated in the [Strategic Plan](#).