

TITLE: Financial Aid Technician II

CLASSIFICATION: Classified

SALARY GRADE: C09

SCOPE OF POSITION:

Under general supervision, assists students in securing financial aid. Communicates with students, staff and external agencies to exchange information and resolve issues or concerns; refers students to other college departments, community resources and external agencies. Advises students on aid applications and application process, including application planning, money management practices, and available sources of aid. Evaluates and processes financial aid applications and 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. The Financial Aid Technician II has responsibility of and accountability for calculating repayments, evaluating special circumstances and appeals, and confirming aid eligibility according to federal verification regulations. 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. Responds to inquiries and provides information to students, parents, District and local community members regarding standards, requirements, data, practices, policies and procedures; oversees program support functions for federal and state financial aid programs, and scholarships.
2. Evaluates and processes applications to determine financial aid eligibility for federal and state aid programs and grants. Collects, reviews, and sends corrections or verified files. Assists students and parents in creating accounts and navigating the financial aid process. Packages and awards financial aid; prepares tracking and award letters; updates awards for internal use.
3. Prepares and maintains records and reports related to students, budgets, accounts and assigned activities and financial aid programs; uses report writing tools to prepare reports; reconciles accounts and budgets.
4. Processes Satisfactory Academic Progress (SAP) appeals and delivers appeal decisions and probationary requirements to maintain students' approved status. Verifies, reviews, and processes students' documentation and financial aid educational plans, and collaborates with the Counseling department to resolve issues.
5. Monitors student academic progress to evaluate financial aid eligibility. Places students on various academic progress statuses and informs students of appeal process to reinstate aid.
6. Evaluates, processes, and performs needs' analysis to determine student eligibility for Direct Loans. Approves or denies requests based on financial aid policies and procedures and determines the amount of loan funds to be requested. Determines students' maximum eligibility for specific loans. Certifies and processes loans through financial aid software.

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KEY DUTIES AND RESPONSIBILITIES – Continued

7. Evaluates and reviews Foundation scholarship applications.
8. Audits the work of other staff. Reviews packaged student files for accuracy and ensures corrections are made.
9. Implements financial aid functions to ensure that requirements are met and eligible students are awarded based on unit enrollment and satisfactory academic progress.
10. Participates in outreach and in-reach efforts, and creates presentations and video content regarding federal and state financial aid programs. Collects and provides financial wellness information.
11. Interprets and implements the Family Educational Rights and Privacy Act of 1974 (FERPA) and Deferred Action for Childhood Arrival (DACA) regulations and District policies and procedures.
12. May serve as a lead worker to other classified employees in the area.

KNOWLEDGE OF:

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

ABILITY TO:

1. Apply financial aid eligibility criteria in a fair, consistent, and objective manner.
2. Compile and analyze data.
3. Provide financial aid information to students and parents.
4. Collaborate productively and cooperatively with individuals and groups both internally and/or externally.
5. Communicate effectively, both orally and in writing.
6. Exercise appropriate judgement in interactions with others and with work processes.
7. Interact with the public in a helpful, courteous, and professional manner.
8. 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.)

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EDUCATION:

Associate degree in a closely related field of study required.

EXPERIENCE:

1+ year of increasingly responsible financial aid experience required.

OTHER REQUIREMENTS:

- 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.
- Must be able to perform physical activities such as, but not limited to, lifting (up to 50 lbs. unassisted), bending, standing, climbing, crawling or walking.

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](#).