



Cañada College ♦ College of San Mateo ♦ Skyline College

GENERIC POSITION DESCRIPTION

FINANCIAL AID TECHNICIAN

A Classified Position

[Grade 26A – Salary Schedule 60](#)

A. General Statement

The Financial Aid Technician position involves complex clerical work at the action level. Incumbents are involved in compilation of data, assessment and processing of student eligibility for financial aid awards and services. Under general supervision, the employee provides financial aid policy and procedural information; compiles and assesses data used to determine student eligibility for a variety of awards and related services. The Technician analyzes data, reconciles program accounts, and prepares statistical and other reports to document financial aid packages awarded. Public contact is extensive. The Technician is in contact with students, staff, other educational institutions, community organizations, business representatives, funding agencies, and the general public. This contact includes the exchange of policy and procedural information concerning eligibility criteria, assessment and awarding of financial aid and other related program services. A moderate to high degree of independent judgment and creativity is required to apply prescribed federal, state, district and college policies and guidelines to a variety of individual situations in order to arrive at appropriate recommendations. Consequences of errors in judgment could be costly in public relations, employee time, money and result in state/federal compliance or audit findings. The Financial Aid Technician may lead the work of other staff and student assistants as assigned.

B. Duties & Responsibilities

The duties below are representative of the duties of the classification and are not intended to cover all of the duties performed by the incumbent(s) of any particular position. The omission of specific statements of duties does not exclude them from the position if the scope of work is similar, related, or a logical assignment to this classification.

1. Provides information to students regarding federal, state and institutional financial aid program requirements and other enrollment services policy and procedural information to students, parents, staff, other educational institutions, community organizations, business representatives, funding agency personnel and the general public.
2. Evaluate documented financial need; advise parents and students about availability, application process, rights and responsibilities related to student aid. Compiles confidential and other data to assess and document student income status, expenditures and projected budgets, enrollment status, grades, employment records, immigration status, residency, tax filing status and other information and award students.
3. Analyzes students records using electronic or paper supporting documentation to identify errors, correct data and reprocess changes in student records as required.

4. Verify selected student records as required.
5. Participates in community outreach activities to promote the financial aid and enrollment services; drives a motor vehicle to attend off-site meetings, workshops, recruitment programs and other special events;
6. Attends workshops, conferences and trainings as needed to remain current on regulatory changes, technical requirements and processes, and other areas.
7. Confers with government and funding agencies regarding immigration, tax, residency and other eligibility issues;
8. Meets with students to assess their financial aid eligibility, College standing and projected financial and enrollment service needs;
9. Conducts detailed data assessments in order to select appropriate loans, grants and other programs for students, based on eligibility and need; assists supervisory staff on special and regular projects and reports as assigned; monitors program expenditures and project budget expenditures using prescribed funding agency and District policies and financial guidelines;
10. Uses a variety of computer systems, software and web sites to set up, maintain and monitor confidential and other student records and files;
11. Uses spreadsheets and a variety of other computer software to compose and prepare original correspondence, narratives, memoranda, research data for and prepare reports in support of programs and services, and to document eligibility, student demographics, profiles, financial status and other data.
12. Provides college and community referral services to students as appropriate;
13. Confers with employers, community and government agency representatives, high school staff, financial institutions, and other College staff regarding student job opportunities, follow-up to previous referrals, recruitment activities and other services;
14. Directs the work of clerical and other staff on special projects and other workloads as assigned.
15. Help cover front desk and answer questions at busy times, as necessary.
16. Makes presentations to small and large groups regarding available loans and grants, eligibility criteria, programs and student services offered, required forms and timelines and other information;
17. Identifies and reports anomalies or other information that may identify potential fraud or misuse of state or federal funds
18. Maintains close working relationship with Admissions and Records, Cashiering, Counseling, EOP&S and other campus offices.
19. Technicians may be assigned some or all of the duties as listed above.

C. Requirements

This position requires a combination of education and experience equivalent to completion of an Associate Degree in Business Administration, Accounting or a closely related field; and successful work experience of increasing responsibility that has included accounting, budgeting or other financial record keeping, preferably in banking or related financial loan services; extensive public contact with people at various levels within organizations who are diverse in their cultures, language groups and abilities; demonstrated skill in oral and written communication, including public speaking; leading the work of others; compiling data for, composing and preparing reports, correspondence, memoranda and other written materials; detailed record keeping; use of a database and a variety of computer software. Previous experience in a Financial Aid Office is desirable. Possession of a valid California Drivers' License and the ability to drive a motor vehicle to off-site locations are required.

D. Physical/Other Requirements

This position requires attention to detail; logical/linear thinking; good memory, data analysis and synthesis; adaptability; flexibility; patience and tact in order to perform the essential functions.

E. Knowledge, Skills & Abilities**Knowledge of:**

1. Federal, State, District and Institutional financial aid policies, procedures, guidelines and required reports related to the award, continuation and follow-up of student loans, grants, student employment, Return to Title IV Programs Multiple Pell Reporting and Potential Pell Overpayments and other related services.
2. Federal, State, District and Institutional programs, services and other resources available to assist students in counseling, Trio, CARE, EOPS, Veterans Services, eDisbursement, immigration procedures, employment, tutoring, enrollment, record keeping and other areas.
3. Processing corrections for various federal and state programs.
4. Processing files for students selected for Verification, resolve data discrepancies, calculate and adjust records for Post Withdrawal Disbursements or Overpayments.

Skills in:

1. Interviewing, assessment and advising techniques
2. Skill in communicating respectfully, sensitively and effectively with people at various levels within an organization who are diverse in their cultures, language groups and abilities.
3. Skill in organization and in following written instructions, formulas and guidelines to analyze data for the purpose of drawing conclusions.
4. Skill in use of enterprise computer systems and a variety of federal and state web sites and various software programs to set up and maintain detailed records and to compose a variety of written materials.
5. Skill in oral communication, including persuasive communication skills.
6. Skill in written communication.
7. Skill in working cooperatively with others and effectively as part of a customer service team.
8. Skill in working accurately with financial and statistical data.
9. Skill in directing the work of others.

Ability to:

1. Use tact and discretion in handling confidential information.