



Cañada College ♦ College of San Mateo ♦ Skyline College

GENERIC POSITION DESCRIPTION

FINANCIAL AID ASSISTANT

A Classified Position

[Grade 22A – Salary Schedule 60](#)

A. General Statement

The Financial Aid Assistant position involves clerical work at the first-level of assessment and processing of student eligibility for financial aid awards and services. 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 initial overview information to students, staff and others regarding financial aid and enrollment services policy and procedural information; compiles data for, and performs preliminary assessment of student eligibility for a variety of awards and related services. Public contact is extensive, primarily including students, staff, other educational institutions, community organizations, business representatives, funding agencies, and the general public, for the purpose of exchanging policy and procedural information about College and program services. A moderate degree of independent judgment and creativity is required to resolve frequent minor problems that arise and to apply prescribed criteria in order to make appropriate client referrals. The Financial Aid Assistant leads the work of 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. Exchanges preliminary financial aid and other enrollment services policy and procedural information with students, parents, staff, other educational institutions, community organizations, business representatives, funding agency personnel and the general public
2. Participates in community outreach activities to promote financial aid and enrollment services as directed
3. Drives a motor vehicle to attend off-site meetings, workshops, recruitment programs and other special events to obtain and provide current information
4. Makes presentations to small and large groups regarding available loans and grants, eligibility criteria, programs and enrollment services offered, required forms, timelines and other information

5. Interviews students to assess their financial aid eligibility, college standing and projected financial and enrollment service needs
6. Distributes and collects required application and supplemental forms
7. Audits forms and materials for accuracy
8. Contacts outside agencies and organizations to assist students in obtaining required forms and information
9. Screens student inquiries and refers students to appropriate department, College and community personnel as appropriate; assists supervisory staff on special and regular projects and reports as assigned
10. Uses a database and a variety of computer software 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 routine correspondence, memoranda, research file data for and prepare routine reports as assigned
12. Interviews students regarding student employment and skills, in conjunction with other staff
13. Confers with requesting departments regarding student employment opportunities and placement
14. Audits and tracks student work hours, pay rates and work schedules, as assigned
15. Organizes and manages copying and distribution of forms and documents to current and prospective students
16. Manages supply inventory and ordering of office supplies and equipment
17. Performs other duties as assigned

C. Requirements

1. Graduation from high school and college courses in business administration, accounting, or a closely related field
2. Successful complex clerical experience of increasing responsibility that has included financial record keeping, preferably in banking or related financial loan services
3. Extensive public contact experience with people at various levels within an organization who are diverse in their cultures, language groups and abilities
4. Demonstrated skill in oral communication, including public speaking
5. Demonstrated skill in written communication
6. Experience with the use of a variety of computer software to compose and prepare correspondence, reports, presentations, and other written materials
7. Experience with detailed record keeping
8. Experience with research and compiling data for, formatting, and preparing statistical, financial and other reports
9. Demonstrated skill in multi-tasking, prioritizing workloads, and working independently
10. Demonstrated skill in working as part of a customer service team
11. Possession of a valid California Drivers' license (or the ability to obtain one) and the ability to drive a motor vehicle to off-site locations

OR

An equivalent combination of education and experience

D. Physical/Other Requirements

This position requires direct contact with individuals and groups; public speaking; selective listening; selecting alternatives using prescribed criteria; persuasive communication; visual comparison; good memory; tact; patience; discretion; work accurately under deadline pressure with details; ability to diffuse anger; manual dexterity; driving a motor vehicle to off-site locations; discretion; sensitivity; pulling, pushing; and multi-tasking in order to perform the essential functions.

E. Knowledge, Skills & Abilities

1. Knowledge of State and Federal financial aid policies, procedures, guidelines and required forms related to the awarding, continuation and follow-up of student loans, grants and related services
2. Knowledge of District and College programs, services and other resources available to assist students in counseling, immigration procedures, employment, tutoring, enrollment, record keeping and other areas
3. 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
4. Skill in the use of a computer database and a variety of software to set up and maintain detailed records and to compose and prepare a variety of written materials
5. Skill in organization, multi-tasking, and workload prioritizing under deadline pressure, using independent judgment for decision-making
6. Skill in oral communication, including giving clear and concise instructions
7. Skill in written communication
8. Ability to follow written instructions, formulas, and guidelines to analyze data for the purpose of drawing conclusions
9. Ability to work cooperatively and effectively with others as part of a customer service team
10. Ability to use tact and discretion in handling confidential information