Cañada College ⬥ College of San Mateo ⬥ Skyline College

GENERIC POSITION DESCRIPTION

FINANCIAL AID TECHNICAL SUPPORT SPECIALIST
A Classified Position
Grade 34 – Salary Schedule 60

A. General Statement

The Financial Aid Technical Support Specialist performs complex technical work related to analyzing and resolving problems with the Financial Aid systems as they occur and in playing a key role in the testing documentation, and training of business processes related to Financial Aid. The Financial Aid Technical Support Specialist must possess a combination of functional and technical expertise and, under the supervision and direction of the Financial Aid Director, will assist ITS staff with research, analysis and communication of policies and regulations and its impact on the district's enterprise software (Banner) and other systems configuration. Under direction, the employee compiles data for Financial Aid computer programs; analyzes data, reconciles computer program problems, and prepares statistical and other reports to document. 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 concerning eligibility criteria, assessment and award packages and related program services. A high degree of independent judgment and creativity is required to apply prescribed 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 and result in institutional liability and audit exceptions. The Financial Aid Technical Support Specialist can lead and direct 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. Maintains currency with Federal and State regulations that may have an effect on financial aid processing and plays a lead role in the research, understanding, and interpretation of policies and regulations and its effect on system configuration.
2. Completes necessary research and analysis to communicate with ITS and other staff configuration requirements needed for compliance with policies and regulations
3. Participates in community outreach activities to promote financial aid and enrollment services; drives a motor vehicle to attend off-site meetings, workshops, and recruitment programs and other special events to obtain and provide current information;
4. Leads the effort to prepare training documentation and to train other staff on policies and procedures
5. Generates various reports and letters and coordinates automation with ITS

6. Works closely with ITS staff in configuring and testing the annual new year roll setup, Banner upgrades, and related system changes as well as current and forthcoming software form the Department of Education and California Student Aid Commission for monitoring, processing and reporting of grants, scholarships, loans, and other sources of financial assistance;
7. Exchanges financial aid and enrollment services policy and procedural information with students, parents, staff, other educational institutions, community organization, business representatives, funding agency personnel, and the general public
8. Serves as technical resource for the College and District regarding financial aid and various student related services
9. Makes presentations to small and large groups regarding available loans and grants, eligibility criteria, programs and services offered, required forms and timelines, and other information
10. 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 using prescribed funding agency and District policies and financial guidelines;
11. Confers with or attends training opportunities from government and funding agencies regarding immigration, tax, residency and other eligibility issues
12. Meets with students to assess their financial aid eligibility, student standing, and projected financial and enrollment service needs
13. Computes and compiles data using various databases from student and funding agency records in conjunction with other colleges, ITS, and other district staff
14. Prepares original correspondence, narratives, memoranda, and research data reports in support of programs and services and to document eligibility
15. Tracks and reports on trends in student population changes, economic status, college completion rates, student usage of related college services, and other data
16. Researches data for and completes required funding agency and district reports and surveys
17. 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 initiate awards for students
18. Analyzes and verifies students' records using electronic or paper supporting documentation to identify errors, correct data, and reprocess changes in student records as required
19. Identifies and reports anomalies or other information that may identify potential fraud or misuse of state or federal funds
20. Uses a variety of computer systems, software and websites to set up, maintain and monitor confidential and other student records and files
21. Confers with students, staff and others, as applicable to resolve complex application and eligibility issues
22. Leads the work of clerical and other staff on special projects and other workloads as assigned

C. Requirements
1. Associate's degree or the equivalent in business administration, accounting, or a closely related field
2. Three years of experience in a Financial Aid Office with a strong background in computer solutions
3. A strong understanding of the BANNER Enterprise System with familiarity of interactions between cashiering, admissions and records, and financial aid
4. Ability to navigate and work with multiple secure federal systems and web sites including, but not limited to NSLDS, COD, EdConnect, and IFAP
5. Ability to manage compliance issues for federal, state and district procedures and regulations
6. Ability to develop creative solutions to use federally prescribed operations to test and operate district software solutions
7. Extensive public contact experience with people at various levels within organizations who are diverse in their cultures, language groups and abilities
8. Demonstrated skill in oral and written communication, including public speaking
9. Experience in leading the work of others

10. Demonstrated skill in the use of a variety of software for compiling data, composing and preparing reports, correspondence, memoranda and other written materials
11. Demonstrated skill in detailed recordkeeping and the use of a database
12. Skill in leading the work of others
13. Demonstrated skill in working as part of a customer service team
14. Possession of a drivers' license and the ability to drive a motor vehicle to off-site locations as required
    OR
    An equivalent combination of education and experience

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

E. Knowledge, Skills & Abilities

1. Knowledge of 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. Knowledge of federal, state, and institutional programs, services and other resources available to assist student in counseling, TRiO, CARE, EOPS, Veterans Services, eDisbursement, immigration procedures, employment, tutoring, enrollment, record keeping and other areas

3. Knowledge of procedures for processing corrections for various federal and state programs

4. Knowledge of the consequences of system programming, system parameter setup and operational processes in employee time, mistakes in funding authorized for students and errors in awarding federal funds

5. Knowledge of procedures for processing files for students selected for verification, resolving data discrepancies, calculating and adjusting records for post withdrawal disbursements or overpayments

6. Knowledge of college programs, services and other resources available to assist students in counseling immigration procedures, employment, tutoring, enrollment, record keeping and other areas

7. Knowledge of applicable computer systems and their use

8. 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

9. Skill in following written instructions, formulas, and guidelines to analyze data for the purpose of drawing conclusions

10. Skill in interviewing and assessment techniques

11. Proficiency in the use of computer systems and a variety of software to set up and maintain detailed records and to compose a variety of written materials

12. Skill in oral communication, including persuasive communication skills

13. Skill in written communication, including composing technical documentation

14. Skill in working cooperatively and effectively with others as part of a team

15. Skill in working accurately with financial and statistical data

16. Skill in directing the work of others

17. Skill in use of the Microsoft Office Suite and web-based content management systems

18. Ability to use tact and discretion in handling confidential information

(10/2013)