

## **PERALTA COMMUNITY COLLEGE DISTRICT - July 2024**

### **CLASSIFIED JOB DESCRIPTION**

#### **SENIOR FINANCIAL AID SPECIALIST (SEIU Local 1021 Salary Range 100 Job Code: 1089)**

##### **CLASS PURPOSE**

Under the direction of assigned manager, administers federal, state, and District financial aid program funds; provides program accountability for all sources of financial aid including to represent the office during audits; serves as a lead and technical expert regarding area of assignment.

The Senior Financial Aid Specialist is a classification performing a wide range of analytical duties for the Financial Aid Programs in one or more specialized technical areas of financial aid operations. This classification is distinguished from the Financial Aid Specialist by assuming additional responsibility in financial aid operations.

##### **WORK SCHEDULE**

This is normally a full-time position with a work schedule of five days and 40 hours/week. Duties are performed 12 months a year. May be required to work some evenings and Saturdays during peak periods, such as registration, audits, fiscal year end, graduation, etc.

##### **EXAMPLES OF ESSENTIAL DUTIES:**

Any one position may not include all the duties listed nor do listed examples include all tasks which may be found in positions of this class. To perform this job successfully, an individual must be able to perform each essential duty of the position satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions required for the position.

- Ensures that timelines are met for District, state, and federal requirements relating to the duties of the Financial Aid Office.
- Performs a variety of duties related to funds eligibility and disbursement; analyzes applications and verifies eligibility in compliance with applicable local, state, and federal regulations and guidelines; verifies that all preliminary work done on student files is correct and meets all regulations; generates student financial aid packages; monitors attendance and academic progress of all students who have accepted federal and state financial aid; using a variety of tools, corrects amounts, returns checks, and requests stop payment/reissue of checks to ensure students receive the amounts they are eligible for; accounts for proper expenditures of financial aid funds; coordinates with Business Office to resolve problems; prepares various reports.
- Determines and assigns each student a budget and cost of attendance; makes adjustments as necessary; calculates student's financial need and sets actual family contribution; determines and

**Job Description: Senior Financial Aid Specialist**

assigns packaging group; determines which funds the student is eligible for; works with campus based programs such as Federal Supplemental Educational Opportunity Grant; determines eligibility for various grants/programs; makes initial determination of subsidized/unsubsidized loan eligibility; gathers information from students to justify special petitions for Satisfactory Academic Progress (SAP) processes.

- Prepares and transmits Common Origination and Disbursement (COD) files to the US Department of Education for each eligible student. Identifies and clears any errors, rejects or discrepancies prior to authorizing payment to each student.
- Utilizes EdConnect to transmit/receive files from COD/National Student Loan Data System (NSLDS). Coordinates with the District Financial Aid, District IT and other District and colleges offices as it relates to financial aid systems for effective management of all financial aid programs.
- Manages student stale dated check (returned check) disbursement process. Works on student financial aid refund reversals on BankMobile. Investigates and resolves disbursement issues with the involvement of internal and external partners.
- Loads California Dream Act Applications from California Student Aid Commission. Reviews and certifies student GPA files for submission to CSAC. Performs Cal Grant and other state grant reconciliations through WebGrants and software systems.
- Reconciles federal funds monthly with the U.S. Department of Education. Performs a variety of funds management and reconciliation duties; ensures that proper procedures/policies/rules/regulations are applied to all federal/state programs; analyzes and calculates financial aid funding needed from various federal and state programs; monitors federal and state accounts to ensure that financial aid monies are accurately drawn and deposited into correct District accounts; coordinates with internal and external auditors to guarantee program fund accountability and integrity; completes federal payment documents; oversees and verifies federal and state grant and loan accounts; monitors federal authorization of funding; monitors status of program fund account ledgers with District's Business Services staff.
- Performs a variety of research and reporting duties; gathers, interprets, and analyzes a variety of data; completes and prepares a variety of records and reports; develops and creates reconciled data files for information to be transmitted to other agencies; gathers data and information to complete surveys and reports including those for other agencies and institutions.
- Gathers, interprets and analyzes District financial aid data for the Fiscal Operations Report and Application to Participate (FISAP). Compiles and assists in completing the FISAP, used to determine and maintain the Districts funding allocations and participation in all Federal Financial Aid Programs.

## **Job Description: Senior Financial Aid Specialist**

- Coordinates and administers the Return of title IV finding (RT24). Determines liability and returns the correct program funds to the U.S. Department of Education; determines what portion the student must repay. Federally mandated dates must be adhered to.
- Participates in the development/design of financial aid software reporting tools; establishes and maintains financial aid processing rules within the software; installs network software and updates; modifies and inputs data elements to comply with regulatory changes; coordinates with representatives from state and federal agencies to troubleshoot problems with specialized software and data base integrity; designs reports to provide information to applicable agencies.
- Performs a variety of customer service duties; serves as point of contact with students regarding office services; interacts with other College District organizational units to provide students with a comprehensive financial aid package; explains programs to students and assist them with completing applications; coordinates award activities with internal and external contacts.
- Performs a full range of clerical and technical duties in support of program operations; temporarily relieves manager of administrative details including to research and resolve problems; assembles files and duplicates materials; composes and prepares office correspondence, materials, reports, forms, brochures, presentations, handbooks, manuals, and consumer information. Maintains current knowledge and learn new state and federal laws, rules, and regulations pertaining to financial aid; reviews updated or new technical instructions or references; attends seminars, conferences, workshops, and other training sessions; participates in the development of new/revised procedures to accommodate changes; assists in providing training and direction to others regarding changes and new regulations including to create and disseminate new instructions.
- Trains and provides work direction to assigned student workers and temporary help as assigned.
- Performs other related duties as required.

## **MINIMUM QUALIFICATIONS**

1. Bachelor's Degree from an accredited college or university with major course work in business administration, public administration, counseling, or a related field; or an equivalent combination of training and qualifying experience which demonstrates the ability to perform the duties of the position.
2. Four years of responsible experience in a financial aid office, including one year of experience in specialized area of financial aid administration for which the staff will be serving as a technical lead.

## **DESIRABLE QUALIFICATIONS**

### **Knowledge of:**

- Policies and procedures of financial aid programs.
- Pertinent federal, state, and local laws, codes, and regulations including state and federal requirements for financial aid records, eligibility, and awarding regulations, policies, and guidelines.
- Program reporting requirements; fundamental accounting, budgeting and fiscal reporting procedures.
- Methods used in evaluating student eligibility.
- Principles and techniques of interviewing and counseling.
- Principles of budget preparation and control. Principles and procedures of record-keeping.
- Modern office procedures, methods, and equipment, including computers.
- Computer applications such as word processing, spreadsheets, and statistical databases including specialized software for financial aid processing.

### **Ability to:**

- Coordinate and direct college financial aid programs.
- Understand the organization and operation of the District and of outside agencies as necessary to assume assigned responsibilities.
- Understand, interpret, and apply general and specific administrative and departmental policies and procedures as well as applicable federal, state, and local policies, laws, and regulations.
- Plan and organize work to meet changing priorities and deadlines.
- Work cooperatively with other departments and outside agencies.
- Respond tactfully, clearly, concisely, and appropriately to inquiries from the public, students, staff, or other agencies on sensitive issues in area of responsibility.
- Prepare clear and concise reports, complex correspondence, and program reporting.
- Understand, interpret and apply legislation pertaining to financial grants and loans.
- Exercise sound, consistent and professional judgment in reviewing and screening applicants. Design and provide informative workshops to students and the community.
- Work with and exhibit sensitivity to and understanding of the varied racial, ethnic, cultural, sexual orientation, academic, socio-economic, and disabled populations of community college students.

## **ENVIRONMENTAL DEMANDS**

- Occasional work performed alone
- Constant work around and with people

**Job Description:** Senior Financial Aid Specialist

## **PHYSICAL REQUIREMENTS**

- Occasional standing, walking, stooping, kneeling, squatting, and climbing stairs
- Occasional lifting and carrying up to 15 lbs.
- Occasional pushing and pulling up to 20 lbs.
- Occasional twisting of body
- Occasional use of manual dexterity
- Occasional use of tactile acuity
- Occasional use of visual acuity from a distance, with depth, and for color
- Frequent work at a rapid pace
- Frequent reaching, high, low, and level
- Frequent audio acuity at all ranges, including speech
- Frequent visual acuity for reading
- Constant sitting
- Constant use of clear oral communication

## **TOOLS AND EQUIPMENT USED**

- Standard Office Equipment.

Revised: N/A