

# CLASSIFICATION SPECIFICATION

## Financial Aid Technician

FT/PT Class Code: 4016, 4516      Pay Grade: B/C 08      FLSA: Non-Exempt      Rev. 07/01/13

**SUMMARY STATEMENT:** An incumbent assists students in the completion of financial aid applications at the basic level, relates which documents are required, and performs necessary computer tasks.

### NATURE AND SCOPE:

An incumbent typically reports to a technical supervisor and may supervise work study students. An incumbent solicits financial data from the student and assists in the preparation of forms. A significant aspect of this class is the need to interact with the Registrar's, Admissions, and Business Offices.

### PRINCIPAL ACCOUNTABILITIES:

***An incumbent may perform any combination of the below listed accountabilities:***

1. Advises students, either individually or through campus workshops, as to basic eligibility requirements for financial aid, types of aid available, and how to complete forms accurately.
2. Reviews financial aid forms for accuracy and maintains necessary documentation, either computerized or manually, as required by State and federal regulations. Requests additional information for incomplete or inconsistent applications.
3. Inputs financial information into and verifies output from the Electronic Data Exchange (EDE). Assists with the initial Federal Direct Lending application process.
4. Verifies enrollment status and academic standing of students to ensure on-going eligibility of students. Monitors loan default rosters and applies/removes financial aid holds.
5. Trains and supervises work study students.
6. Performs clerical functions such as typing, answering phones, scheduling appointments, processing mail and paperwork, etc.
7. Prepares reports for specific financial aid programs such as the Student Excellence Equals Degree (SEED) program. Collects SEED scholarship applications, reviews for accuracy and completeness, enters the tracking codes in the student records system, and obtains required official high school transcripts.
8. Assists in student placement efforts through the job center when needed.
9. Performs other related duties as required.

### **KNOWLEDGE, SKILLS, AND ABILITIES:**

- ◇ Knowledge of financial aid options.
- ◇ Knowledge of state and federal rules and regulations.
- ◇ Knowledge of counseling and interviewing techniques.
- ◇ Skill in oral and written communications.
- ◇ Ability to operate computer equipment and other office machines.
- ◇ Basic keyboarding skills.
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- ◇ Good interpersonal and communication skills.

### **MINIMUM QUALIFICATIONS:**

- ◇ High school diploma or GED, and two (2) years of relevant experience; or other equivalent combination of education and experience.