

## FINANCIAL AID ASSISTANT

### DEFINITION

Performs specialized clerical duties related to the processing of applications and forms for the various grant, loan, and scholarship programs available to students in a college's Financial Aid Office or the Central Financial Aid Unit of the District Office.

### TYPICAL DUTIES

Performs a variety of specialized clerical duties related to the processing of applications and forms for various financial assistance programs, which includes coding and checking documents, correcting errors, reconciling records, and reviewing documents for completeness, accuracy, and compliance with applicable legal requirements.

Verifies initial and continuing eligibility of students who have applied for or been granted financial aid and informs affected students of their status.

Interacts with and answers inquiries from students and others regarding a particular individual's status or various aspects of financial aid programs such as basic program information and proper completion of financial aid applications.

Seeks necessary information from financial aid reference material to complete financial aid applications and other related documents.

Reviews computer printouts for accuracy and completeness and prepares appropriate input documents.

Maintains financial aid office files and other records.

Operates a computer terminal to input and retrieve information from a variety of specialized financial aid and student records systems.

Utilizes standard office software applications to compile data and prepare information and correspondence.

Prepares correspondence to students regarding financial aid matters.

Attends and participates in seminars on financial aid topics.

May provide work direction to student employees.

Performs related duties as assigned.

### DISTINGUISHING CHARACTERISTICS

A **Financial Aid Assistant** performs specialized clerical duties related to providing financial assistance to students in a college's Financial Aid Office or the Central Financial Aid Unit of the District Office; operates a computer terminal to input and update financial aid related data.

A **Financial Aid Technician** oversees and participates in one or more of the functional phases of awarding scholarships, loans, and grants at a college or has full responsibility for one major financial aid program at a college or the Central Financial Aid Unit of the District Office; performs tasks on several software programs including downloading of information.

### SUPERVISION

Immediate supervision is received from a Financial Aid Manager or Financial Aid Supervisor. Work direction is received from a Financial Aid Technician. May provide work direction to student employees.

## CLASS QUALIFICATIONS

### Knowledge of:

- Customer service techniques for public contact in person and on the telephone
- Clerical practices and procedures
- Principles of business English, spelling, punctuation, and grammatical usage
- Letter, memorandum, and report formats
- Capabilities of computer systems, software, and hardware common to a Financial Aid Office
- Principles of recordkeeping

### Skill in:

- Use of computer and standard office equipment

### Ability to:

- Record data neatly and accurately in standard and electronic files
- Critically review source data, detect, and correct errors
- Maintain accurate files and records
- Give clear and concise instructions
- Use proper spelling, punctuation, and grammar
- Perform mathematical computations accurately
- Keep information confidential
- Work under pressures of deadlines and frequent interruptions
- Communicate effectively with individuals from various ethnic and socio-economic backgrounds
- Work effectively and tactfully with students, staff, faculty, and the public
- Prepare routine correspondence and reports
- Effectively utilize computer hardware and software in the performance of duties
- Learn federal and state regulations, requirements and procedural guidelines pertaining to governmentally funded programs of student financial assistance
- Learn, comprehend, interpret, and apply regulations and procedures related to the functions of a financial aid office
- Learn general and specialized software applications

## ENTRANCE QUALIFICATIONS

### Education:

- Graduation from high school or its equivalent.

### Experience:

- None is required. One year of paid full-time general clerical experience which included use of computer equipment and public contact is desirable.