

## FINANCIAL AID SUPERVISOR

### DEFINITION

Supervises the day-to-day operations of a college's Financial Aid Office in its functions of analyzing student financial needs, determining financial aid eligibility, reviewing financial aid applications, awarding scholarships, loans, and grants, and maintaining related files and records.

### TYPICAL DUTIES

Supervises and coordinates the day-to-day operations of a Financial Aid Office, including the areas of analysis of financial assistance needs, determination of financial aid eligibility, review of financial aid applications, awarding of scholarships, loans, and grants, and maintenance of financial aid records and files.

Selects, trains, and supervises the work of assigned staff engaged in all phases of the student financial aid program.

Assists in the development of financial aid operational procedures to comply with federal and state regulations.

Conducts research on costs of housing in the geographic area served by a college.

Compiles facts and figures and writes periodic and special reports as required or requested by state and federal officials and the District administration.

Supervises the front counter and other designated service areas within the Financial Aid Office.

Reviews accounting records of each financial aid program for accuracy and compliance with state and federal regulations and takes corrective action where indicated.

Maintains liaison with District Accounting Division for reports and reconciliation of fund and loan balance.

Utilizes standard office software applications to compile data and prepare reports and correspondence concerning student financial aid matters.

Utilizes specialized financial aid computer application programs such as ED Express (EDE), Common Origination and Disbursement (COD), National Student Loan Database System (NSLDS), Return to Title IV, National Student Clearinghouse, and Webgrants.

Hears student appeals in problem cases and takes appropriate corrective action when warranted.

Designs and writes copy for bulletins, brochures and other material for student financial aid information.

Attends and participates in program-related seminars, conferences, workshops, and other meetings concerned with the implementation of state and federal laws and regulations on financial aid.

Supervises the maintenance of student financial aid records.

May act for the financial aid administrator in his or her absence.

May review individual students' grant and loan awards for compliance with applicable state and federal regulations as well as student need.

Performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS

A **Financial Aid Supervisor** supervises activities related to the day-to-day operations of a college's Financial Aid Office, including the areas of analysis of student financial needs, determination of student financial aid eligibility, review of financial aid applications, and awarding of financial aid, as well as maintenance of related records and files. A thorough knowledge of financial aid program policies, goals, and procedures is continuously applied in performing the duties of the class.

A **Financial Aid Manager** develops, implements, and manages the student financial aid programs at one of the colleges of the District or of the Central Financial Aid Unit at the Educational Services Center; serves as the financial aid administrator of record for all purposes specified within federal and state regulations and guidelines.

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 at the Central Financial Aid Unit of the Educational Services Center; performs tasks on several software programs including downloading of information.

## SUPERVISION

General supervision is received from an academic or classified supervisor. Immediate supervision is exercised over assigned financial aid staff.

## CLASS QUALIFICATIONS

### Knowledge of:

- Federal and state regulations, requirements, and procedural guidelines pertaining to governmentally-funded programs of student financial assistance
- Eligibility requirements and application procedures for financial aid programs
- Principles of office management
- Computerized financial aid award and tracking systems
- Techniques of counseling and interviewing
- Principles of financial record keeping
- Principles of supervision and training
- Research methods
- Organization and management of files
- Capabilities of computer applications, systems, and hardware used in the management of student financial aid programs

### Ability to:

- Effectively supervise a complex program of student financial assistance
- Interpret and apply federal and state laws and regulations pertaining to financial aid programs
- Gather, compile and analyze statistical and financial data

Ability to: (Cont.)

- Prepare reports in written, graphic and tabular form
- Advise students on personal financial management
- Communicate effectively with individuals from various ethnic and socio-economic backgrounds
- Establish and maintain effective relationships with staff, faculty, administrators, students, and representatives of other jurisdictions
- Plan, assign, and supervise the work of assigned staff
- Analyze situations correctly and take effective action
- Provide training in financial aid procedures
- Work confidentially with discretion
- Learn specialized software applications

ENTRANCE QUALIFICATIONS

Education and Experience:

- A. An associate's degree from a recognized college or university, preferably with course work in accounting, business administration, economics, finance, public administration, or a closely related field **AND** three years of full-time, paid experience in a college or university financial aid office, two years of which must have included determining financial aid eligibility or packaging financial aid awards. One year of the required experience must have been in a supervisory capacity. A successfully completed college-level course in supervision or management may substitute for the required one year in a supervisory capacity.

**OR**

- B. Graduation from a recognized four-year college or university, preferably with a major in accounting, business administration, economics, finance, public administration, or a closely related field **AND** two years of full time, paid experience in a college or university financial aid office, which must have included determining financial aid eligibility or packaging financial aid awards. One year of the required experience must have been in a supervisory capacity. A successfully completed college-level course in supervision or management may substitute for the required one year in a supervisory capacity.

Special:

A valid California Class "C" driver's license must be obtained within 60 days after appointment.  
Access to an automobile.

Some positions in this class may be required to obtain a license as a Notary in the State of California after appointment. Such license must be obtained within six months of notification of this requirement.