

Citrus College

Position Description

Position: Financial Aid Team Leader	Position Number:
Department/Site:	FLSA: Non-exempt
Reports to:	Salary Range: 40

Summary

Performs a variety of office leadership and technical duties related to advising on, assisting with, and packaging student loans and other financial aid programs for final approval. Organizes and prioritizes workload and analyzes, researches, and resolves problems connected with financial aid. Coordinates data transmission to and from funding agencies.

Distinguishing Career Features

The Financial Aid Team Leader is the senior-most classified position engaged in financial aid transaction processing and reporting. To qualify for this level, prospective incumbents must demonstrate complete knowledge of financial aid programs to determine student eligibility, the ability to package and determine loan amounts, and the ability to audit balances and generate data transmittals to and from the College and funding agencies. At this level, incumbents must also demonstrate advanced knowledge of the operating characteristics and features of federal, state, and internal computer programs used for financial aid and student information.

Essential Duties and Responsibilities

- Organizes, prioritizes, and assigns work and projects to team members within Financial Aid. Trains and provides quality reviews of work performed in the department.
- Monitors Federal and State accounts in accordance with regulations to ensure financial aid funds are accurately reported. Monitors program fund accounts to ensure students are not awarded more than their allocation.
- Transmits Federal individual payment summaries to the U.S. Department of Education in accordance with mandated Federal deadlines.
- Oversees requests for direct loan funds from direct loan origination centers. Monitors and tracks arrival of direct loan funds to County and District's direct loan bank accounts.
- Reconciles direct loan accounts and various Federal and State grant award accounts. Reconciles various account ledgers. Balances fund accounts with internal ledgers and other appropriate sources, including the U.S. Department of Education.
- Establishes procedures for intake and processing of student applications. Guides and advises students and prospective students concerning the financial aid programs. Explains complex policies and procedures.
- Reviews and evaluates financial aid applications to determine accuracy,

Financial Aid Team Leader

@Jacobson, Betts & Company

Effective July 1, 2004

Revised & Approved by CSEA: May 10, 2006 _____

completeness and financial need level. Uses Federal Methodology need-analysis criteria for review. Performs any required follow-up to get additional information, correct errors or elicit more in-depth data from applicants.

- Researches and resolves identified conflicts by utilizing various external databases to review prior loan histories and financial information.
- Verifies application data for accuracy. Compares FAFSA data with verification documents (1040, Worksheets, W-2's, etc.). Corrects information on a financial or student database, performs needs analysis, and prepares computer files for reprocessing.
- Sets up financial aid packaging parameters that other staff members can follow to establish award levels. Packages and determines award levels within established guidelines. Communicates award levels with students, sets up accounts along with disbursement and payments dates, and receives and allocates award funds from grantors.
- Grants financial aid awards. Determines need levels, confirms resources, and awards funds within pre-existing parameters. Oversees the process of direct loans, which may include loan origination records for eligible students, enters information into databases, and monitors responses and data from Federal loan origination centers.
- Compiles and completes a variety of reports that involve research, including but not limited to, Federal Fiscal Operations Report and Application to Participate.
- Ensures departmental fund accountability and integrity for audit purposes, that contributes to the District having continuing eligibility to participate in Federal and State programs.
- Provides one-on-one advising for students, parents, or others regarding financial aid issues, procedures to award, reasons for denial or lack of eligibility, deadlines, petition processes and other relevant issues.
- May provide partial leadership over certain aspects of the day-to-day office routine by organizing and prioritizing workload, reviewing applications and awards for accuracy and compliance, and reviewing financial aid budget projections.
- Assists applicants in completing the various forms required for financial aid. Resolves problems with applications and/or financial aid checks.
- Troubleshoots and resolves problems associated with financial aid application status, award levels, student information, communications among separate computer systems, and data integrity.
- Extracts and imports information from financial aid databases to support reporting and auditing. Updates tables in databases.
- Troubleshoots problems accessing, storing, manipulating, remitting, and extracting data to and from financial aid and student databases.
- Assists the Director with day-to-day leadership, prioritizing work, and handling of urgent requests and issues.

- Serves as departmental liaison to information technology for data management and networked computer matters.
- Performs other duties as assigned that support the overall objective of the position.

Qualifications

▪ Knowledge and Skills

Requires in-depth knowledge of the regulations, rules, and institutional policies and processes relating to financial aid and the connections to admissions, registration, and accounting. Requires in-depth knowledge of federal and institutional satisfactory academic progress policies. Requires in-depth knowledge of Federal and State regulations, policies and procedures relating to awarding and administering financial aid. Requires a working knowledge of regulations and institutional policies and relevant to admissions, registration, accounts payable, and financial aid practices. Requires knowledge of and skills with office policies, procedures, and equipment, including the use of personal computers to access student information databases, word processing, and spreadsheet applications. Requires a working knowledge of transcripts and satisfactory academic progress. Requires advanced skill at working with specialized databases used in financial aid. Requires well-developed human relation skills to convey technical concepts to customers in individual and workshop settings, and exercise patience. Requires sufficient language skill to prepare written correspondence used in external communications. Requires sufficient math skills to compute principal, interest, sums, percents, and ratios.

▪ Abilities

Requires the ability to independently perform all of the duties of the position with efficiency and effectiveness. Requires the ability to access and enter, import, and export data to and from computer-aided student financial aid applications including the ability to update special tables. Requires the ability to apply financial needs analysis methodology. Requires the ability to analyze technical and complex information and documents and make assessments according to complex policies, procedures, and mandated regulations. Requires the ability to impart technical and detailed information through one-on-one or group presentations. Requires the ability to perform data entry and database management duties and other general record keeping and file maintenance duties. Requires the ability to communicate both formally and informally with a wide range of contacts both inside and outside the College setting. Requires the ability to perform assignments on varying work schedules.

▪ Physical Abilities

Incumbent performs work of predominately a sedentary nature. Requires ambulatory ability to sit in front of a computer screen for extended periods of time, to move about between work station and customer service counters, and to reach for work materials and files. Requires sufficient hand, arm, and finger dexterity to operate computer keyboard, typewriter or other office equipment. Requires visual acuity to read words and numbers. Requires speaking and hearing ability sufficient to hear over phone and carry on routine conversations.

▪ Education and Experience

The position typically requires an Associate's degree and five years of progressively responsible student financial aid experience. Comparable related work experience

may substitute for some higher education.

- **Licenses and Certificates**

May require a valid driver's license.

- **Working Conditions**

Work is performed indoors where minimal safety considerations exist.