

## Citrus College

## Position Description

Position: Financial Aid Technician	Position Number:
Department/Site:	FLSA: Non-exempt
Reports to:	Salary Range: 31

### Summary

Performs specialized clerical and technical duties related to processing and storing information for student grant and other financial aid programs. Maintains student financial obligation records. Provides technical assistance and information to students, staff and the public.

### Distinguishing Career Features

The Financial Aid Technician is the second in a multi-tiered career path for financial aid transaction processing. To qualify for this level, prospective incumbents must demonstrate the ability to verify eligibility, process financial aid documents, and determine award levels. Advancement to this level also requires in-depth knowledge of a full array of financial aid programs. Advancement to Financial Aid Advisor requires advanced knowledge of student financial loan programs and student and financial aid databases, sufficient to install, maintain, and troubleshoot database elements.

### Essential Duties and Responsibilities

- Interviews students participating in the various loan programs, interpreting state and federal guidelines applying to the programs.
- Explains the approved eligibility, requirements for program qualification and compliance, and program options so that students make informed decisions about their obligations.
- Instructs students in correct procedures for completion of forms and applications, special requirements and restrictions, and supporting documentation such as tax returns, income and housing verifications, and transcripts. Reviews completed forms for accuracy and completeness.
- Assists students and parents with FAFSA financial aid applications, processing procedures, and interpreting policies of the funding organizations. Explains the different types of financial aid programs, including obligations and payment schedules.
- Processes loan/financial aid awards, consulting with others as necessary, and notifying successful applicants.
- Services financial aid accounts. Maintains up-to-date addresses. Audits student financial records to determine amounts owed. Prepares communications for repayment, payback on excess payments, and other accounts owed.
- Creates, maintains, and periodically reviews student records to assure compliance with provisions of financial aid and grants. Checks student eligibility for work study

Financial Aid Technician

@Jacobson, Betts & Company

Effective July 1, 2004

Revised & Approved by CSEA: May 10, 2006 \_\_\_\_\_; Revised and CSEA approved April 25, 2008

and other programs.

- Administers delinquent and default loan procedures. Receives information from the Department of Education and other sources, including internal reports, verifies account balances and student status, and initiates written contact with students. Works with students to restore current account status.
- Maintains financial aid records to support preparation of financial aid reports for various grant and loan disbursements. Monitors and revises budgets and awards as necessary to prevent over spending of awards.
- Performs basic troubleshooting of problems associated with financial aid accounts, student status, and computer-aided files.
- May prepare standardized correspondence for/to students, verifying status and other information.
- Performs miscellaneous clerical duties for the office such as updating policy and procedure manuals and award tables, editing student files, replenishing forms and communication devices, collecting data for reports, and preparing general correspondence.
- Performs other duties as assigned that support the overall objective of the position.

## **Qualifications**

### **▪ Knowledge, Skills, and Abilities**

Requires a working knowledge of the policies and procedures associated with federal, state, and local financial aid programs including grants and waivers. Requires a working knowledge of federal and institutional satisfactory academic progress policies. Requires a working knowledge of regulations and institutional policies relevant to admissions, registration, accounts payable, and financial aid practices. Requires knowledge of and skills with routine office policies, procedures and equipment, including PCs and applicable student information databases, word processing and spreadsheet applications. Requires sufficient English language skill to prepare routine correspondence. Requires sufficient human relation skills to provide general information to student-customers, exercise patience when dealing with students, resolve confrontations, and convey a positive image of the college. Requires sufficient math skills to compute principal, interest, sums, percents, and ratios.

Requires the ability to perform all of the duties of the position efficiently and effectively with minimal supervision. Requires the ability to perform financial record keeping, data entry, file maintenance, and report writing duties. Requires the ability to communicate program elements and requirements with students, faculty and outside agencies/customers. Requires the ability to instruct students on the financial aid application process and to resolve conflict. Ability to perform data entry onto an automated information systems. May require 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, 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**

Requires a high school diploma, or the equivalent, and financial aid experience in a college or university setting, or any experience in a related field.

- **Licenses and Certificates**

May require a valid driver's license.

- **Working Conditions**

Work is performed indoors where minimal safety considerations exist.