



**System Wide Job Description
Financial Aid Specialist**

Salary Level:
CCP 15

Date Approved/Revised:
Rev 1. 8/16/24

POSITION PURPOSE:

The Financial Aid Specialist provides operational support to the Financial Aid Office, with a focus on assisting with the review and processing of financial aid paperwork and providing information to a variety of individuals regarding financial aid, payment plans, and student aid eligibility. The incumbent will assist with the accurate processing of all financial aid application and student loan materials within a highly automated environment. The Financial Aid Specialist provides student service in person and other communication channels to assist with the financial aid process for students and families. This position is located on ground at a campus location.

SUPERVISORY AND OTHER RELATIONSHIPS:

This position reports to the Campus Supervisor for Financial Aid Services. This position may train and lead student workers in the financial aid office, if assigned. This position is required to have extensive cooperative relationships with a variety of students, parents, and staff, which requires obtaining, processing, and protecting a high volume of confidential information. The position requires regular interaction with other departments within the Enrollment Management and Student Affairs division.

EXAMPLES OF DUTIES:

The following examples of duties illustrate the general range of tasks assigned to the position, but are not intended to define the limits of required duties. Other essential duties may be assigned consistent with the general scope of the position.

- Maintains the front counter for all student-facing, in-person activity.
- Provides excellent service to students, their families, outside agency personnel, and members of the college community.
- Assists students with the completion of all aspects of the application for financial aid, ensuring completion through the receipt of a financial aid package.
- Responds in a timely manner to student inquiries through a variety of communication techniques. Additionally, makes outgoing communication efforts.
- Facilitates in person and online workshops to assist with FAFSA completion.
- Provides information on financial literacy and other associated topics.
- Counsels and assists prospective and currently enrolled students and their families on the FAFSA application process and eligibility for financial aid.
- Provides information on eligibility requirements, application processes and procedures, status of financial aid application and award and required additional documentation as needed. Determines if the student's inquiry requires further follow-up and directs the inquiry to the appropriate source for resolution, as necessary.
- Prepares or assists in the review of student aid applications, including verification, c-flags, and rejects. This includes the review of all documentation needed to complete a student's file for packaging.
- Responsible for the quality assurance and document linking within the imaging system.
- Monitors the academic performance of student aid recipients in accordance with Satisfactory Academic Progress regulations.
- Maintains current and complete knowledge of federal, state, and institutional financial aid regulations.

- Reviews and processes student loan requests in accordance with federal law and regulations.
- Maintains an alpha caseload to ensure necessary documents are received and conflicting information resolved to ensure aid can be disbursed.
- Runs reports as needed.
- Reads and interprets federal and state financial aid regulations and guidance.
- Adheres to all office policies and procedures.
- Interacts favorably with any third-party vendors.
- Works with grant, loan, and reporting functions within all federal systems, including COD, CPS, and NSLDS, as needed.
- Communicates effectively with supervisor and other office staff to ensure successful departmental operations.
- Performs other duties and tasks to support the overall success of the division.
- May involve occasional evening or weekend work.

PROFESSIONAL PARTICIPATION AND DEVELOPMENT

In addition to the accountabilities listed above, the incumbent is required to carry out the essential duties of:

- Attendance and participation at convocation, commencement, and honors ceremonies;
- Service on assigned committees and task forces;
- Attendance and participation at committee, staff, informational, and professional meetings.

QUALIFICATIONS:

The Financial Aid Specialist is required to have demonstrated advanced knowledge and abilities in the following areas:

- Demonstrates an ability to relate favorably to students, parents, and college staff.
- Knowledge of state and federal financial aid rules and regulations.
- Strong organization and analytical skills.
- Proficiency with office technology, such as Microsoft Word, Excel, and PowerPoint.
- The ability to multi-task with complex subject matter in a fast-paced environment.
- Must possess strong interpersonal, written, oral, and presentation skills.

These skills and abilities typically are acquired through a combination of education, training and experience which would include a Bachelor's degree in an appropriately related field together with one to four years of related experience in financial aid in higher education or related field; or a combination of education, training and experience which would lead to the competencies required for successful performance of the position's essential duties.

WORK ENVIRONMENT

The incumbent typically performs work in offices, conference rooms and in locations where groups of students, faculty and staff gather. The work does not, normally, involve any significant physical effort. The incumbent may travel to public sites to make presentations as well as travel to regional or central meetings and conferences.