

PALOMAR COMMUNITY COLLEGE DISTRICT

FINANCIAL AID ASSISTANT

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

To perform technical and clerical support for Financial Aid and Scholarship services; to assist students with the financial aid application process; and to perform a variety of clerical tasks relative to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Director Financial Aid & Scholarships.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS

Essential and other important responsibilities and duties may include, but are not limited to, the following:

Essential Functions:

1. Assist students with the financial aid application process; interpret and explain the financial aid application rules and regulations; direct students to appropriate Financial Aid Advisor for complex questions and/or situations that could change the eligibility of a student.
2. Greet visitors at the front counter; respond to telephone inquiries from students, parents and staff regarding financial aid issues.
3. Review student applications for financial aid for accuracy and completeness; enter all incoming documentation into computer system.
4. Provide technical and clerical assistance to financial Aid Advisors; perform a variety of clerical duties; compose and type various forms, letters and memoranda.
5. Review, edit and prepare state enrollment waiver reports (BOGW).
6. Supervise and monitor work assignments for front counter part-time staff; train assigned employees on front counter services and procedures.
7. Prepare student files for awarding; prepare student files for petition review.
8. Organize and maintain storage and disposal of student files.
9. Sort and process all incoming and outgoing mail.

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10. Maintain office supplies; maintain supply of financial aid applications and information material.
11. Serve as a liaison to all education centers.

Marginal Functions:

1. Process and print a variety of reports as needed.
2. Present financial aid information at established workshops as needed.
3. Perform related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Federal and State financial aid application process.
Federal and State financial aid laws and regulation.
Modern office procedures, methods and equipment including computers.
Principles and procedures of record keeping.
English usage, spelling, grammar and punctuation.
Basic mathematical principles.

Ability to:

Explain the financial aid application process.
Review and analyze student financial aid documents.
Perform technical and specialized clerical work.
Operate office equipment including computers and supporting word processing and spreadsheet applications.
Prepare clear and concise reports.
Respond to requests and inquiries from the general public.
Understand and follow oral and written instructions.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.
Maintain physical condition appropriate to the performance of assigned duties and responsibilities.

Experience and Training Guidelines

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Two years of increasingly responsible technical and clerical experience.

Training:

Equivalent to the completion of the twelfth grade. Additional college level course work in finance, business administration or a related field is desirable.

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WORKING CONDITIONS

Environmental Conditions:

Office environment; exposure to computer screens.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sitting for prolonged periods of time.