

## Palomar Community College District

### FINANCIAL ASSISTANCE SPECIALIST

*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 the duties performed within the job.*

#### **DEFINITION**

To perform clerical and technical support activities through the College's integrated software system for Financial Aid and Scholarships, Veterans' Services, and Admissions and Records; to provide assistance to students on financial assistance/educational benefits and scholarships; to monitor and track student application and document files; and to perform a variety of specialized tasks relative to assigned area of responsibility,

#### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from the Director of Financial Aid and 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. Maintain and ensure confidentiality of all pertinent student documents and records.
2. Respond to inquiries at the front counter and phone from students regarding financial aid, veterans', and scholarships information and processes including admissions, registration, and records and their individual applications and document files.
3. Conduct outreach activities for Financial Aid and Scholarships by maintaining and updating all publication materials, including those in PDF and webpage format, such as the scholarship application booklet, phone tree, electronic sign board, Financial Aid/Veterans' Educational Benefits webpage, Financial Aid application packet, informational brochures, and other educational benefits information resources.
4. Review applications and documents submitted by students for completeness and conflicting information.
5. Perform data entry on documents submitted and information received by other College departments or outside agencies, including data input of data elements from documents required for the verification process.
6. Perform review and data entry of submitted BOGW applications.
7. Assist the Financial Assistance Advisor in the review, data entry and maintenance of documents.
8. Prepare and maintain student file records for verification, award processing, and check disbursement, including generating applicable letters and status reports.
9. Contact students regarding their file or award status and check disbursement; maintain and update the appointment schedule (i.e. SARs program) and phone tree for the department.
10. Provide procedural guidelines on financial aid, veterans' educational benefits, and scholarships including admissions, registration, and records to students and other College personnel.
11. Coordinate activities and perform tasks relative to assigned area of responsibility including the scholarship program, Financial Aid and Scholarships outreach, Veterans' Services and equipment and supply requisitions.
12. Serve as the department's liaison to other departments and committees.
13. Maintain and update the policies and procedures manual and applicable forms and documents for area of responsibility.
14. Perform confirmation, verification, and certification of documents such as Outside Agency Verification, Concurrent Enrollment Verifications, and other documents as needed.

**PALOMAR COMMUNITY COLLEGE DISTRICT**  
**Financial Assistance Specialist (continued)**

15. Provide technical and clerical assistance to the Financial Aid Services Coordinator and Financial Assistance Advisors.

**Marginal Functions:**

1. Distribute and pick up incoming and outgoing on- and off-campus mail.
2. Perform related duties and responsibilities as required or assigned.

**QUALIFICATIONS**

**Knowledge of:**

Federal, State, and local financial aid, veterans' educational benefits regulations, policies and programs  
Principles and procedures of financial recordkeeping and reporting  
Basic financial aid, veterans' and scholarships eligibility  
Modern office procedures, methods and equipment, including computers  
Applicable computer software applications  
English usage, spelling, grammar, and punctuation  
Basic mathematical and accounting principles

**Ability to:**

Understand and apply College financial aid, veterans', and scholarships policies and procedures  
Interpret, explain, and apply laws, rules and policies regulating financial aid, veterans' and scholarship programs  
Interpret, explain, and apply District policies and procedures pertaining to admissions, registration, and records  
Operate a computerized college software system for financial aid, veterans' services, scholarships, admissions, and registration  
Deal with students from various backgrounds under stressful situations  
Discuss and explain financial aid, veterans' and scholarship policies and procedures in individual and group settings  
Maintain a variety of accurate records and files  
Respond to requests and inquiries from the general public  
Work independently in the absence of supervision  
Understand and follow oral and written instructions  
Operate office equipment, computers, and supporting software programs and spreadsheet applications, including an integrated relational database system such as PeopleSoft  
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 student services experience in student financial assistance/educational benefits and scholarship programs.

**Training:**

Equivalent to the completion of the twelfth grade; additional college-level coursework in finance, business administration, or a related field is desirable.

**PALOMAR COMMUNITY COLLEGE DISTRICT**  
**Financial Assistance Specialist (continued)**

**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.

5/24/06