



Classification Title: Admissions/Financial Aid Specialist

Department:	Multiple	EEO6 Code:	5
Employee Group:	Classified	Salary Grade:	22
Supervision Received From:	An Assigned Administrator or Supervisor	Date of Origin:	9/2016
Supervision Given:	General Supervision	Last Revision:	9/2022

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 by individual positions.

JOB SUMMARY.

Performs a full range of enrollment, admissions and financial aid duties at a front counter or in a back-office environment on District-wide and special programs relevant to assigned areas of responsibility, including international students, education centers and others; answers a wide variety of questions from prospective students, parents, faculty, other District employees and the public.

DISTINGUISHING CHARACTERISTICS.

Admissions/Financial Aid Specialist is a single-incumbent class responsible for performing duties associated with admissions, enrollment and financial aid processes.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS.

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

1. Assists current, returning, concurrently enrolled and prospective students, parents, District faculty and staff and the public at a front counter on a wide range of admissions, enrollment and financial aid questions and processes; explains procedural guidelines for admissions, registration, records, evaluations, financial aid, scholarships and Federal Work Study employment with applicable District, federal and state regulations; provides general information about the District; responds to and resolves difficult and sensitive inquiries and complaints.
2. Receives and reviews for completeness and consistency of information a wide variety of admissions and enrollment forms including applications, non-credit applications, applications to audit classes, pass/no pass forms, overlapping class forms, K-12 Minor Consent forms, residency documents, initial registrations, adds/drops of classes, changes in address and other student data, petitions for grade changes and college withdrawal, changes in major and other documentation; tracks and monitors the progress of forms from submission and completion; enters student data into various tracking screens in PeopleSoft; downloads documentation and enters student data into PeopleSoft; maintains and files student applications and documentation; notifies applicants of their admissions and financial aid status.
3. Receives and reviews for completeness and consistency of information a wide variety of financial aid forms and documentation including applications, asset and household size worksheets, Internal Revenue Service (IRS) tax transcripts, Proof of Dependent forms, proof of citizenship, official academic transcripts, fee deferment and waiver forms, Projected Year Income Request forms and other documentation; explains how to complete federal and state financial aid applications including the Free Application for Federal Student Aid (FAFSA), California Dream Act and Board of Governors fee waiver; explains deadlines and disbursement dates; refers students to other agencies as

necessary to obtain required documentation; reviews, makes determinations and processes Board of Governors fee waiver applications; informs students of eligibility status and enters information into students' financial aid records.

4. Reviews and processes documentation such as immigration documentation and visas and permanent resident documents submitted by students in support of claims for California residency as well as A.B. 540 Non-Resident Tuition Exemptions; notifies students regarding additional information or documentation required and the status of their residency determinations; sends out reminders on documentation that needs to be submitted; notifies students when their documentation establishing residency expires; prepares reports and recommendations on residency appeals submitted to the Senior Director, Enrollment Services; explains the rationale for residency determinations; recalculates tuition and fees as needed; informs students of state grants and waivers for which they may be eligible; notifies Financial Aid, Veterans and Scholarship Services of students' residency status so that eligibility for aid programs can be assessed.
5. Processes applications and documentation and tracks all K-12 students enrolled at Palomar College; reviews and ensures the accuracy of K-12/health consent approval forms; enters and maintains data in PeopleSoft for all K-12 students; maintains files and data on newly accredited K-12 schools and private/home school affidavits issued by the California Board of Education for research and audit purposes; ensures Health Services receives all health consent forms and responds to any questions or concerns; coordinates with students and parents regarding the admissions process and responds to questions and requests for copies of K-12 approval forms and unit limit petitions; researches and develops new procedures and policies to ease the transition of students into the college environment.
6. Maintains working relationships with K-12 schools in the District's service area; performs K-12 admissions outreach, meeting with counselors and other personnel to provide information on the application process and answer questions on admissions and financial aid.
7. Carries out Positive Attendance activities for Enrollment Services; generates class attendance rosters and populates attendance information in PeopleSoft; reviews attendance data to ensure accuracy in reporting and calculates the hours of student attendance in classes with irregular schedules such as apprenticeship and supplemental education classes for the purpose of obtaining state funding for the District; follows up with faculty to secure past due attendance data and resolve data discrepancies and inconsistencies; maintains required records and reports.
8. Schedules assessment, orientation and advisor/counselor appointments based on state priority registration guidelines using SARS scheduling software.
9. In a back-office environment, uses a computer and multi-line telephone system to respond to telephone and email inquiries, explain requirements and deadlines and provide information; maintains and files student applications and documentation; notifies applicants of their admissions and financial aid status.
10. Communicates to students the benefits of priority registration and required procedures to follow.
11. Maintains all student documentation to meet retention and audit requirements; maintains and ensures the confidentiality of all student documents and records in accordance with the Family Educational Rights and Privacy Act (FERPA) and established District policies and procedures.

When assigned to International Education:

12. Reviews applicant records and documents including passports and visas, financial status, English proficiency documentation and academic transcripts to determine eligibility for admission based on District requirements and U.S. Department of Homeland Security regulations and policies; ensures documents and files are complete and serves as a Designated School Official during peak periods and in the absence of the Coordinator, International Education for establishing that F1 visa regulations are met; notifies applicants of their admission and I-20 status; maintains records to ensure ongoing compliance with requirements; assists students and others by responding to a wide variety of admissions, registration, fee and other requirements, issues and questions; assists students with student health insurance applications; participates in outreach activities and in orientation sessions.

When Assigned to an Education Center:

13. Performs cashiering services for students to pay tuition and other fees, buy bus passes and identification cards and make payments for a variety of other fees and debts; place and remove holds on student accounts when needed; receives and posts other District deposits; provides backup for other departments and staff when they are unavailable; contacts the Palomar College Police Department and other District staff on behalf of students as required; assists students by responding to questions and providing a variety of support to students and student workers at the Center; when position is assigned to an education center with Saturday operations: oversees center operations on Saturdays in the absence of supervision.

Marginal Functions:

1. Maintains currency on changes in federal and state law, regulations and processes relevant to assigned areas of responsibility; identifies changes required in District requirements and procedures; recommends revisions in processing guidelines, procedures and manuals to ensure conformance with new requirements; trains staff on changes in procedures.
2. Performs a variety of administrative support functions and special projects as assigned.
3. Receives requests for transcripts; verifies holds and times required; sends to Evaluations and Records for processing.
4. Performs related duties and responsibilities as required.

QUALIFICATIONS.

Experience and Education/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: One year of experience involving admissions, student records and/or financial aid processes, and one year of clerical recordkeeping experience.

Education/Training: Equivalent to completion of the twelfth grade.

Knowledge of:

1. Basic goals and objectives of a college admissions and financial aid office.
2. Sections of the California Education Code applicable to assigned responsibilities.
3. The Family Educational Rights and Privacy Act (FERPA) and other state and federal laws, rules, regulations and policies governing student admissions and financial aid.
4. Operations of a computer and uses of standard business applications including word processing, spreadsheet and database software, enterprise software, and scheduling systems.
5. Office administration practices and procedures, including filing and recordkeeping systems.
6. Basic research methods and procedures.
7. Business mathematics.
8. Principles and practices of sound business communication; correct English usage, grammar, spelling and punctuation.
9. Concepts, practices and techniques of customer service.

Skill in:

1. Interpreting, explaining and applying administrative policies, procedures and practices relevant to assigned areas of responsibility, ensuring consistency and a high degree of accuracy.

2. Evaluating alternatives and reaching sound decisions within areas of assigned responsibility.
3. Operating a computer and other standard office equipment and using spreadsheet, word processing and enterprise software.
4. Responding in-person and by telephone to a high volume of varying inquiries and requests at a public counter or by telephone, calmly, patiently and effectively.
5. Maintaining sensitivity to and understanding of the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds of community college students, faculty, and staff.
6. Preparing clear, concise and accurate records, data entries, reports and other written materials.
7. Communicating clearly and effectively, both orally and in writing.
8. Maintaining the confidentiality of student records and information.
9. Using tact, discretion, courtesy and patience in dealing with sensitive and difficult students and situations.
10. Establishing and maintaining effective working relationships with others encountered in the course of work.

WORKING CONDITIONS.

Environmental Conditions: The employee works under typical office conditions with extensive exposure to computer screens and frequent contact with faculty, students, family members, staff of other departments and the public, some of whom may be upset or angry.

Physical Conditions: Essential and marginal functions may require physical fitness requirements necessary to perform the job functions with or without accommodation, such as the ability to sit for prolonged periods; near visual acuity for reading computer screens, reports and schedules; repetitive use of hands for extensive use of keyboards.

TERMS OF EMPLOYMENT.

The duration of any fully restricted funded position in this classification is dependent upon the continuation of funding.