

SANTA BARBARA COMMUNITY COLLEGE DISTRICT

CLASSIFICATION: **CLASSIFIED**

CLASS TITLE: **FINANCIAL AID SPECIALIST**

SALARY TABLE: **29**

SALARY RANGE: **32**

BASIC FUNCTION:

Under the direction of the Director-Financial Aid, perform a variety of computer operations involved in processing, modifying and generating student data, records, files and reports related to financial aid; perform a variety of technical accounting duties in the review, evaluation, maintenance, reconciliation and adjustment of related accounts; serve as a technical resource concerning financial aid and related student information, funds and eligibility.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Receive, review and process a variety of student data, files, letters and reports related to financial aid; review information for accuracy and compliance with established standards and requirements; troubleshoot, diagnose and resolve problems with automated data and reports.

Perform a variety of technical accounting duties in the review, evaluation, maintenance, reconciliation and adjustment of financial aid accounts; compile, assemble, calculate and post various financial and statistical data including income and expenditures; balance and adjust accounts.

Input, download and adjust a variety of student and financial data and information in an assigned computer system; establish and maintain automated records and files; create queries, extract data, develop spreadsheets and generate computerized reports; assure accuracy of input and output data.

Serve as a technical resource to students and staff concerning financial aid and related student information and eligibility; respond to inquiries and provide technical information and training concerning related standards, requirements, files, funds, laws, regulations, policies and procedures.

Prepare and maintain a variety of financial and statistical records, reports, charts and statements related to student accounts, financial aid, Pell, fund disbursement, grants, awards, budgets, income, expenditures, attendance and assigned activities.

Receive, print and distribute student files, records and reports; import and export automated data and files; audit data for errors and make corrections as needed; compose

and distribute a variety of correspondence related to financial aid such as student letters, awards and messages.

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Compare and reconcile financial aid accounts and related forms, statements, records, reports and other financial documents; audit accounts for errors and make appropriate adjustments; verify financial data, student information and eligibility as needed.

Communicate with College personnel, students and various outside agencies to exchange information and resolve issues, conflicts and concerns related to financial aid, funds, student information, files, enrollment and eligibility; contact others to request information and documents.

Process, issue and post manual checks, voids, stop payments, hold checks and requests to mail; report lost, stolen and outdated checks; process deferments as needed.

Operate a variety of office equipment including a copier, fax machine, computer and assigned software.

Install, configure and maintain software as needed; troubleshoot, diagnose and resolve routine malfunctions; arrange for major repairs as needed.

Maintain current knowledge of laws, regulations, policies and procedures related to financial aid programs for College students; assist in assuring proper implementation of related requirements; assist in assuring financial aid functions comply with established laws, policies and regulations.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF: General practices, procedures and techniques related to financial aid processing, disbursement, reporting and eligibility. Methods, procedures and terminology used in technical accounting work. Record retrieval and storage systems. Principles, methods and procedures of operating computers and peripheral equipment. Financial and statistical record-keeping techniques. Principles and practices of data research, processing and evaluation. College, State and federal standards and requirements related to financial aid. Preparation of financial statements and comprehensive accounting reports. Modern office practices, procedures and equipment. Applicable laws, codes, regulations, policies and procedures. Computer data processing systems and software applications utilized by the College District. Policies and objectives of assigned programs and activities. Oral and written communication skills. Interpersonal skills using tact, patience and courtesy.

ABILITY TO: Receive, review and process a variety of student data, files, letters and reports related to financial aid. Perform a variety of technical accounting duties in the review, evaluation, maintenance, reconciliation and adjustment of financial aid accounts. Utilize a computer to input and adjust data, create queries, generate links to data and

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produce a variety of computerized records, reports and files. Operate computers and peripheral equipment properly and efficiently. Assemble and prepare data for records and reports. Serve as a technical resource to students and staff concerning financial aid.

Compare and reconcile financial aid accounts and related forms, statements, records, reports and other financial documents. Maintain accurate financial and statistical records. Prepare and evaluate comprehensive accounting reports and statements. Verify, balance and adjust accounts. Identify, investigate and resolve financial errors and discrepancies. Interpret, apply and explain laws, codes, regulations, policies and procedures. Type or input data at an acceptable rate of speed. Establish and maintain cooperative and effective working relationships with others. Meet schedules and timelines. Work independently with little direction. Communicate effectively both orally and in writing. Determine appropriate action within clearly defined guidelines.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: graduation from high school and four years' experience involving computer operations. Demonstrated ability to apply technical computer skills and use software applications necessary for implementing financial aid related systems comparable with those used at SBCC. Experience acting as a liaison with IT and outside consultants.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.
Constant
interruptions.

PHYSICAL DEMANDS: Dexterity of hands and fingers to operate a computer keyboard. Hearing and speaking to exchange information. Seeing to view a computer monitor and read a variety of materials. Sitting for extended periods of time.

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