

# **Desert Community College District**

## **Lead Financial Aid Specialist**

### **Basic Function**

Under the direction of the Director, Financial Aid, perform specialized duties in support of the Financial Aid Office; provide assistance to staff and students related to the awarding and disbursement of financial aid; maintain financial aid database; and review and audit work of Senior Financial Aid Specialists.

### **Representative Duties**

#### **Essential Functions**

1. Analyze and process, electronically or manually, requests for financial aid in accordance with established State and College policies, and guidelines, laws, and regulations.
2. Assist with the financial aid database annual set-up process, the development of basic programming, and the maintenance of the system including troubleshooting issues; providing guidance and resolutions.
3. Provide information regarding financial aid programs and answer questions from staff, students and public regarding financial aid programs and the process of receiving financial aid; meet with students to discuss programs and review applications; conduct workshops and scholarship nights at local high schools as assigned.
4. Perform financial aid application data load process, including downloading electronic application and correction records from federal processor. Run and review reports to determine type and level of action to update records and/or resolve discrepancies.
5. Enter data with speed and accuracy; maintain the financial aid database and various systems. Coordinate upgrades with the Director

of Financial Aid and IS; perform tests and run queries to ensure the integrity of data; regularly communicate system updates and train others to successfully implement new modules.

6. Research financial aid records. Resolve problems regarding the application process and the awarding and disbursement of financial aid. Perform revisions to financial aid awards disbursements due to changes in enrollment and/or eligibility requirements.
7. Transmit, monitor, review, and correct Pell Grant and other financial aid information records to and from the federal college system, NSLDS, CPS, and related systems. Follow-up with students and staff to resolve any issues.
8. Ensure the Satisfactory Academic Progress (SAP) evaluation process is executed in accordance with established District, state, and federal policies, guidelines, laws, and regulations.
9. Prepare and send correspondence to students; disburse financial aid awards in accordance with approved policies and practices.
10. Maintain a variety of files, records and reports; prepare and send correspondence; prepare reports as necessary. Gather data and generate production and other reports.
11. Reconcile financial aid programs as assigned.
12. Update and document work procedures regarding financial aid systems, federal aid program reconciliation, and all other areas of responsibility.
13. Review and audit work performed by Senior Financial Aid Specialists in relation to verification and packaging; monitor for compliance with District, federal, state and local regulations, policies.
14. Assist in the selection and training of new employees and student workers; provide work direction to other employees in the Financial Aid Office.

15. Coordinate the activities of the Financial Aid Office in the absence of the supervisor.
16. Maintain current knowledge of financial aid programs, related software, regulations, procedures, and processes. Participate in training related to responsibilities.
17. Operate and maintain current knowledge of a variety of office technology including a computer and related software applications, copier, and calculator.

### **Other Functions**

18. Perform related duties as assigned.

### **Knowledge and Abilities**

#### **Knowledge of:**

- Modern office practices, procedures, and equipment.
- State, federal, and College regulations and procedures regarding financial aid.
- Specialized functions, activities, terminology, and operations of financial aid.
- Record-keeping techniques; operation of a computer, data entry techniques, and applicable software, including Microsoft Office and database management.
- Understand and follow financial aid regulations; understand and work within established policies, guidelines and regulations; communicate policies, guidelines, regulations, and laws to staff, students and the public.
- Oral and written communication skills; interpersonal skills using tact, patience, and courtesy.
- Communication, presentation and public speaking skills. Both one-on-one and group.

- Principles of training and providing work direction.
- An understanding and sensitivity to diversity.

**Ability to:**

- Perform technical work in support of the Financial Aid Office.
- Meet with students and explain and provide information regarding financial aid programs;
- Operate office a computer and applicable software, including Microsoft Office applications and database management.
- Enter and retrieve data with speed and accuracy.
- Recommend improvements to financial aid systems.
- Communicate effectively both orally and in writing to exchange information.
- Ability to interpret and effectively communicate rules and regulations to a diverse audience, both in one-on-one sessions and group presentations.
- Maintain database systems, records, and prepare reports.
- Ability to evaluate and implement Department of Education recommendations and regulations.
- Establish and maintain cooperative and effective working relationships with co-workers and students of diverse backgrounds.
- Work confidentially with discretion; train and provide work direction to others; work independently with little direction.
- Lift 25 pounds; bend at the waist, kneel or crouch to file materials; sit or stand for extended periods of time.

**Education and Experience**

**Any combination equivalent to:**

An Associate's degree supplemented by at least three (3) years in a financial aid function, including one year involving the maintenance of a financial aid

database.

### **Working Conditions**

#### **Environment:**

Office environment. Constant interruptions. Travel to conduct workshops.

Travel to work at other campuses. Requires some weekend and evening responsibilities.

### **Employment Status**

- Bargaining Unit Position
- Range 16

Adopted 8/19/11; Revised **07/27/20**