

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT

CLASS TITLE: 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.*

SUMMARY DESCRIPTION

Under the general supervision of the Director of Financial Aid, perform a variety of routine technical and general clerical and office support duties in support of the District's Financial Aid programs, functions, and operations; provide quality customer service in a multi-culturally diverse environment; and perform other related work as required.

DISTINGUISHING CHARACTERISTICS

The Financial Aid Assistant is assigned routine technical duties in addition to general clerical work of average difficulty. Positions assigned to the Financial Aid Assistant classification are distinguished from the Administrative Clerk class in that positions assigned to Financial Aid Assistant are required to obtain a breadth of knowledge necessary to assist students at the front counter, to assist their assigned Financial Aid Advisor, and to support their assigned program area.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Receive and review incoming financial aid applications for completeness, accuracy, and signature; assist students in completion of loan applications and financial aid paperwork; make determinations regarding any documents necessary to complete the file; input documents received. ***E***
2. Provide information to students, parents, the campus community, and other institutions regarding financial aid policy and procedure; provide information for non California residents as well as those physically challenged or disabled. ***E***
3. Complete eligibility forms from various outside and governmental agencies; complete transcript request forms from requesting colleges and universities. ***E***
4. Post financial aid documents; change and update student educational plan majors in student's file from the database for proper scanning procedures in document image. ***E***
5. Assist with workshops on campus and at local high schools; participate in orientations and seminars. ***E***
6. Perform a full range of general clerical duties in support of assigned operations and programs; post information to operational, business, and student records; type, screen, proofread, and duplicate a wide variety of documents; sort and file documents and records according to predetermined classifications, maintaining alphabetical, index, and cross-reference files. ***E***
7. Compile, list, and summarize information for review by supervisor; prepare routine or recurring reports according to established procedures. ***E***
8. Establish and maintain appropriate files, forms and records; order forms as needed to maintain adequate inventory. ***E***

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9. Operate office equipment including a typewriter, personal computer, scanner, copier, and other office equipment.
10. Perform related duties and responsibilities as required.

KNOWLEDGE AND ABILITIES

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
Federal financial aid software including Datatel.
Principles and practices used to establish and maintain files and information retrieval systems.
Receptionist and telephone techniques and etiquette.
Oral and written communication skills.
Interpersonal skills using tact, patience and courtesy.
Applicable federal, state, and institutional regulations, requirements, and procedural guidelines pertaining to governmentally funded programs and documents for student financial assistance.
English usage, grammar, spelling, punctuation and vocabulary.

Ability to:

Perform a variety of general clerical work of average difficulty involving the use of independent judgment and personal initiative.
Understand the organization, operation, and services of the Financial Aid Office and of outside agencies as necessary to assume assigned responsibilities.
Adapt to changing technologies and learn functionality of new equipment and systems.
Plan and organize work to meet changing priorities and deadlines.
Respond to requests and inquiries from the general public.
Meet critical deadlines while working with frequent interruptions.
Work independently in the absence of supervision.
Maintain confidentiality in handling critical, sensitive information, records and reports.
Understand and follow oral and written instructions.
Operate a variety of office equipment such as a typewriter, computer terminal, calculator and copier.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.

EDUCATION AND EXPERIENCE - *Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

Any combination equivalent to: graduation from high school including or supplemented by course work or specialized training in office procedures, office automation, or a related field; and one year of general clerical experience utilizing a computer and office applications.

LICENSE OR CERTIFICATE

Valid California driver's license and a safe driving record may be required for some positions to drive a District or personal vehicle to attend meetings or pick up/deliver documents or other materials.

Some positions in this class are required to possess skills in a second designated language.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting with extended periods of time viewing computer monitor.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

Vision: See in the normal visual range with or without correction.

Hearing: Hear in the normal audio range with or without correction.