FINANCIAL AID CLERK
Series Specification
Financial Aid Clerk I
Financial Aid Clerk II

DEFINITION
This series specification describes two classes used to perform clerical work and support services in the financial aid center.

TYPICAL DUTIES

Financial Aid Clerk I: Supplies information and advice to students seeking financial aid; and directs applicants to appropriate staff or supervisor after reviewing their needs. Assists students in figuring their budgets; helps students fill out financial aid applications; and checks applications for completeness. Makes adjustments to monetary amounts during awards process, provides applications for outside scholarships; and reviews progress. Generates reports from existing database using financial aid software or similar system, to run needs analysis and package Pell Grant for students. Sets up and maintains individual student records; and types correspondence, forms and reports. Trains and oversees the work of student assistants. Completes service work requests, requisitions, purchase orders, maintenance and supply requisitions; processes receipts for student loan checks and works the counter area. Performs related duties as required.

Financial Aid Clerk II: Supplies information to students seeking financial aid; and explains forms of financial assistance available to students. Directs applicants to appropriate staff or supervisor after reviewing their needs. Advises students seeking financial aid; generates reports from existing database using financial aid software or similar system, to run needs analysis and package financial aid for students; issues and explains verification forms and supportive documents; helps students fill out financial aid applications; provides applications for outside scholarships; and corresponds with students to obtain documentation. Reviews financial aid applications with students for accuracy and completeness; and completes student loan applications, student time sheets and other supportive documents. Reviews and processes financial aid awards with students; makes dollar amount adjustments during award process; processes loan receipts for student loan checks; and records financial transactions and other account information to update and maintain accounting records. Reviews and confirms students’ satisfactory progress; and assists students in figuring their budgets. Sets up and maintains individual student records; and maintains records on students receiving financial aid. Serves as lead person to other financial aid clerks; and trains and oversees student assistants. Advertises and updates information on outside scholarships. Types letters, award information, memorandums and reports; types correspondence, forms and reports; and completes service work requests, requisitions, purchase orders, maintenance and supply requests. Performs related duties as required.

ALLOCATION FACTOR
Level of difficulty, variety and complexity of assigned tasks; breadth and scope of knowledge of federal, state, and local guidelines for financial aid; independence of action and decision-making; and degree of supervision received.
LEVEL DESCRIPTION

Financial Aid Clerk I: Under general supervision of the assigned administrator, performs various duties requiring initial contact with students and their financial aid records. Operations and resources are well defined.

Financial Aid Clerk II: The technical level of the series. Assigned duties require extensive knowledge of policies, rules and procedures pertaining to financial aid. Duties are performed under general supervision of the assigned administrator.

QUALIFICATIONS

EXPERIENCE

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<th>Promotional</th>
<th>General</th>
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<tr>
<td>Financial Aid Clerk I</td>
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<tr>
<td>Six months of experience in Los Rios CCD performing clerical duties at the level of a Clerk II.</td>
<td>One year of general clerical experience preferably including six months of experience in a financial aid office. Or - one year of college level business and clerical course work.</td>
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<tr>
<td>Financial Aid Clerk II</td>
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<td>One year of experience performing clerical duties at the level of Financial Aid Clerk I. OR Two years of experience as a Clerk II.</td>
<td>Three years of increasingly responsible clerical experience preferably including one year of experience in a college financial aid office. One year of college courses may be substituted for one of the years of required experience.</td>
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KNOWLEDGE OF

Both Levels: Knowledge of current computer applications in the financial aid office including: financial aid software, Return of Title Four Program, Webgrants, PCFAPS, student administration software, document imaging, and MS Office applications. Knowledge of numbers, their operations, and interrelationships. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar; and letter and report writing principles. Knowledge of office equipment and methods, including filing systems, letter and report writing and receptionist and telephone techniques.

Financial Aid Clerk II: Knowledge of rules, regulations and policies of the financial aid program. Knowledge of principles and processes for providing customer services including needs assessment techniques and quality service standards; and interviewing techniques. Knowledge of administrative and clerical procedures and systems such as word processing systems, filing and records management systems, forms design principles, and other office procedures and terminology; and office equipment.
Knowledge of numbers, their operations, and interrelationships; and methods and practices of financial record keeping. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar; and letter and report writing principles.

**SKILLS IN**

**Both Levels:** Skill in knowing how to find information; identifying essential information; finding ways to structure or classify multiple pieces of information; and using mathematics to solve problems. Skill in understanding written sentences and paragraphs in work related documents; and communicating effectively with others in writing and orally as indicated by the needs of the audience.

**Financial Aid Clerk II:** Skill in knowing how to find information; identifying essential information; and finding ways to structure or classify multiple pieces of information. Skill in communicating effectively with others in writing and orally as indicated by the needs of the audience; and understanding written sentences and paragraphs in work related documents. Skill in using mathematics to solve problems.

**ABILITY TO (ESSENTIAL FUNCTIONS)**

**Both Levels:** The ability to perform the essential functions of the position; sustain regular work attendance; work cooperatively and effectively with the public, students, faculty and staff; exercise initiative and mature judgment; work as a member of a team; and meet schedules and time lines. Ability to learn and interpret rules, regulations and policies governing the financial aid program; analyze situations accurately and adopt an effective course of action; and operate modern office equipment including personal computers.

**Financial Aid Clerk II:** The ability to perform the essential functions of the position; sustain regular work attendance; work cooperatively and effectively with the public, students, faculty and staff; exercise initiative and mature judgment; work as a member of a team; and meet schedules and time lines. The ability to learn and interpret rules, regulations and policies governing financial aid programs; and correctly follow a given rule or set of rules in order to arrange things or actions in a certain order. The ability to understand and carry out oral and written directions; read and write at the level required for successful job performance; perform basic math functions quickly and correctly; and operate modern office equipment. The ability to determine from College Scholarship Service Analysis Report the type of verification documentation that a student may need.

**TYPICAL EQUIPMENT USED (May include, but not limited to)**

Computer, copier, printer, and calculator.