

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 financial aid support services under the supervision of the assigned supervisor/manager.

LEVEL DESCRIPTION

Financial Aid Clerk I: Under moderate oversight, incumbents perform various duties of a moderate complexity requiring contact with students and their financial aid records; operations and resources are well defined.

Financial Aid Clerk II: Under minimal oversight, incumbents perform a variety of complex tasks requiring more extensive knowledge of policies, rules and procedures pertaining to financial aid.

TYPICAL DUTIES

Financial Aid Clerk I and subsequent level: Supplies information and advice to students seeking financial aid, and directs applicants to appropriate staff after reviewing their needs; assists students in determining 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 database using financial aid software or similar system to run needs analysis and package student financial aid; sets up and maintains individual student records; composes correspondence, forms and reports; oversees the work of temporary classified staff; completes service work requests, requisitions, purchase orders, maintenance and supply requisitions, and related documents; processes receipts for student loan checks and assists at the front counter. Performs related duties as required.

Financial Aid Clerk II: In addition to the duties of the Financial Aid Clerk I, explains forms of financial assistance available to students; participates in in-reach and outreach student events; serve as liaison to other student services departments; conducts presentations on financial aid processes; advises students seeking financial aid; issues and explains verification forms and supportive documents; corresponds with students to obtain documentation; completes student loan applications, student time sheets and other related documents; reviews and processes financial aid awards for students; records financial transactions and other account information to update and maintain accounting records; reviews and confirms students' satisfactory progress; performs audits on student eligibility and takes appropriate action; serves as lead to other financial aid clerks; advertises and updates information on outside scholarships; composes award information, memorandums and reports. Performs related duties as required.

QUALIFICATIONS

EXPERIENCE/EDUCATION

Promotional

General

Financial Aid Clerk I

One year of clerical experience related to the duties of the position.

Financial Aid Clerk II

One year of experience in the Los Rios CCD as a Financial Aid Clerk I; OR two years of experience as a Clerk II.

Three years of clerical experience related to the duties of the position. One year of college course work at an accredited institution may be substituted for one year of the required experience.

One year of experience is equal to 12 months of experience at a maximum of 40 hours per week. Applicable part-time experience will be converted to the full-time equivalent for purposes of meeting the experience requirement.

One year of education is equal to 30 semester units.

KNOWLEDGE OF

Applicable federal, state and local laws, policies and regulations, and office processes and procedures; modern office practices, procedures and equipment; administrative and clerical procedures and systems, such as filing and recordkeeping techniques in a complex business environment; effective customer service skills; how to compose effective correspondence; the structure and content of the English language including the meaning and spelling of words, rules of composition and grammar, and rules for letter and report writing; principles and practices of effective communication; how to train others to perform specific tasks; numbers, their operations, and interrelationships, including arithmetic at the level required to effectively perform the duties of the position; basic principles of leadership, oversight and training.

ABILITY TO

Perform the essential functions of the position; (Anything unique to the job goes here); sustain regular work attendance; work cooperatively and effectively with the public, students, faculty and staff; exercise initiative and mature judgment; interprets and applies applicable federal, state and local laws, policies and regulations, and office processes and procedures; work as a member of a team; meet schedules and timelines; manage one's own time and the time of others; correctly follow a given rule or set of rules in order to arrange things or actions in a certain order; understand and effectively carry out oral and written directions; effectively communicate information and ideas orally and in writing based on the needs of the audience; read, write and perform mathematical calculations at the level required for successful job performance; be aware of others' reactions and adjust interpersonal skills accordingly; handle personal and private information with discretion; prepare routine correspondence independently; effectively learn and operate equipment and software related to the duties of the position; use technology to effectively perform responsibilities, such as word processing, spreadsheets, databases, and desktop publishing;

type/enter data at a speed proficient to complete the duties of the position in a timely manner; adapt to changing technologies; work successfully with diverse populations.

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

Current office technologies such as computers, printers, telephones and copiers; other equipment common to the field to which the position is assigned.