



POSITION DESCRIPTION

Department: Financial Aid & Scholarships

Working Title: Financial Aid Specialist

Job Code: 3079

Time Base: 1.0

Position Number: 00000181

Union / Unit (if applicable): Academic Professionals of California / Unit 4

Position Reports To: Director, EMS Financial Aid & Scholarships Office

Classification: Student Services Professional IB

Range Code: 2

Exempt or Non-Exempt: Non-Exempt

Last Update: 07/22/2024

PURPOSE OF POSITION:

As a member of the Financial Aid and Scholarships team in Enrollment Management Services (EMS), the Financial Aid Specialist will assist in providing the highest level of quality service to students, parents, former students, staff and faculty and will assist in the delivery of more than \$100 million in federal, state, private, and institutional financial aid to more than 8,000 students annually. This position is hybrid. Under the general supervision of the Associate Director of Financial Aid & Scholarships, the incumbent maintains responsibility for:

MAJOR RESPONSIBILITIES:

	<u>%OF TIME</u>
1. Performing review of application documents as part of verification process and to determine eligibility, data analysis, evaluation and resolution	40%
2. Advising students and families of the eligibility requirements of various state and federal programs, assisting them in the application process, and participating in financial aid presentations and outreach events	40%
3. Assisting the Financial Aid Advising team with program reporting and coordination of their respective program responsibilities (i.e. Cal Grant, Pell Grant, Direct Loans)	20%

LIST OF DUTIES FOR EACH MAJOR RESPONSIBILITY:

Performing review of application documents and eligibility

- Follow complex federal regulations and CSUSM policies and procedures, review and analyze financial aid applications, checking for accuracy and consistency, revise awards, follow up with student and families for further information and/or makes assumptions to complete review
- Analyze and review student documentation to resolve federal database match issues, such as selective service, citizenship, social security, etc.
- Revise financial aid awards with respect to changes in enrollment status, changes to a student's budget, receipt of other financial aid awards and at student's request
- Complete requests for confirmation of financial aid eligibility for third party agencies/entities
- Assist with the review and maintenance of Satisfactory Academic Programs
- Assist with the processing and student notification regarding R2T4 calculations

Advising students and families

- Assist students and families in-person, on telephone, and by email on state, federal and institutional program eligibility and documentation requirements
- Advise of funds and eligibility requirements both in the office and at on-and off-campus events; conduct financial aid presentations
- Serve as the primary back-up to the front counter as needed during peak times, lunches, breaks, and absences to front counter staff

Assist with Reporting and Coordination of Aid Programs

- Perform a variety of tasks to assist with coordination of specific student aid programs, including data entry, data retrieval, fund reconciliation, researching student information utilizing various student aid databases such as CSAC WebGrants, Common Origination and Disbursement (COD) and NSLDS
- Run queries and other basic processes and prepare reports on a recurring basis

PROVIDES LEAD DIRECTION OF OTHERS:

N/A

REQUIREMENTS OF POSITION:

1. List certificates, licenses, or education required

- A Bachelor's degree from a four-year college or university in a related field **plus** one (1) year of professional experience in one of the student services program areas; or an equivalent combination of education and experience.
- Minimum 6 months of experience performing verification and auditing.
- Preferences
 - i. Experience with PeopleSoft integrated financial aid system
 - ii. Experience in Financial Aid verification is highly desirable
 - iii. Spanish fluency and the ability to conduct Financial Aid presentations in Spanish
 - iv. Experience at a CSU, specifically SUG management

2. List additional knowledge, skills, and abilities required for this position.

- Thorough knowledge of financial aid programs, needs analysis, policies and procedures.
- Excellent verbal and written communication skills to provide information and services to students, faculty, staff, and other constituents on a daily basis.
- Working knowledge of advising programs and techniques.
- Working knowledge of research and interview techniques.
- Working knowledge of basic principles, practices and major trends in the Financial Aid field.
- Experience gathering and analyzing data, for the processing of financial aid data files, awarding and review of resultant reports.
- Demonstrated ability to reason logically, draw valid conclusions and make appropriate recommendations for review and correction of records as indicated by discrepancy reports.
- Strong organizational skills and ability to meet deadlines
- Ability to work with minimal supervision
- Ability to work in fast-paced environment
- Working knowledge of the basic principles of individual and group behavior
- Working knowledge of research and observation techniques for the purpose of recording, classifying, and interpreting factual information
- Working knowledge of the techniques and methods of interviewing
- Demonstrated ability to remain up-to-date on program requirements and ability to communicate changes to students
- Knowledge, skills and abilities in computer applications: PeopleSoft, Microsoft Access, Word, Excel, Power Point, Internet, Email, and Facebook.
- Critical thinking skills, ability to multi-task, work under pressure, and effectively communicate both written and orally with students, staff, and faculty.
- Ability to maintain confidentiality of records and evaluations.
- Experience communicating effectively in front of groups in conducting presentation.
- Ability to establish and maintain cooperative working relationships with students, staff, and faculty.
- Ability to demonstrate an awareness and appreciation of the cultural diversity of the University community, and establish and maintain cooperative and effective relations with University employees, students, and the public.

3. List machines, tools, equipment, and motor vehicles used in the performance of the duties

- Standard office and communications equipment

4. **Unique working conditions**

- Heavy student/phone traffic
- Fast-paced environment
- Extended periods of time working at a computer keyboard and monitor

5. **Other Employment Requirements**

- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.
- Must participate in required campus trainings including, but not limited to, Information Security Awareness Training and Sexual Violence Awareness and Prevention "EDU: Eliminate Campus Sexual Misconduct".

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

Define working relationships with people on and off campus (other than supervisor or people supervised) with whom this employee interacts on a continuing basis, and how often this interaction occurs.

General Public	Disseminate information regarding policies and procedures	
Daily		and eligibility for financial aid
EMS team	Assist with student referrals	Daily
Student Residential Life	Provide clarification & verification of financial aid	As needed
Student Health Services	Referral of students for physical/mental health services	As needed
EOP/SSS	Refer eligible students	As needed
Faculty & Staff	Disseminate information regarding policies and procedures	
Daily		

PHYSICAL EFFORT: Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

Number of hours/day
N/A 1-2 3-4 5-6 7+

	N/A	1-2	3-4	5-6	7+
1. Sitting					X
2. Standing		X			
3. Walking	X				
4. Bending Over	X				
5. Crawling	X				
6. Climbing	X				
7. Reaching overhead	X				
8. Crouching	X				
9. Kneeling	X				
10. Balancing	X				
11. Pushing or pulling	X				

- 16. Driving cars, trucks, forklifts and other equipment
- 17. Being around scientific equipment and machinery
- 18. Walking on uneven ground

Number of hours/day
N/A 1-2 3-4 5-6 7+

	N/A	1-2	3-4	5-6	7+
12. Lifting or carrying	X				
A. 10 lbs or less					
B. 11 to 25 lbs					
C. 26 to 50 lbs					
D. 51 to 75 lbs					
E. 76 to 100 lbs					
F. Over 100 lbs					
13. Repetitive use of hands/arms					X
14. Repetitive use of legs	X				
15. Eye/hand coordination			X		

Yes No

	X
	X
	X

MENTAL EFFORT

Number of hours/day
N/A 1-2 3-4 5-6 7+

	N/A	1-2	3-4	5-6	7+
1. Directing others	X				
2. Writing		X			
3. Using math/calculations				X	
4. Talking			X		
5. Working at various tempos	X				
6. Concentrating amid distractions					X
7. Remembering names	X				
8. Remembering details					X
9. Making decisions					X
10. Working rapidly					X
11. Examining/observing details					X
12. Discriminating colors	X				

ENVIRONMENTAL FACTORS

Number of hours/day
N/A 1-2 3-4 5-6 7+

	N/A	1-2	3-4	5-6	7+
1. Inside					X
2. Outside	X				
3. Humid	X				
4. Hazards	X				
5. High places	X				
6. Hot	X				
7. Cold	X				
8. Dry	X				
9. Wet	X				
10. Change of temp	X				
11. Dirty	X				
12. Dusty	X				
13. Odors	X				
14. Noisy	X				
15. Working w/others		X			
16. Working around others				X	
17. Working alone			X		

SIGNATURES

The last sheet for any staff position description should contain the signature sheet. Signatures will include the incumbent's signature (if applicable) or new employee; the supervisor's signature and all pertinent administrative personnel.

Employee

Print Name: _____

Signature: _____

Date: _____

Appropriate Administrator (MPP)

Print Name: _____

Signature: _____

Date: _____

Dean/Department Head/Director/AVP (optional)

Print Name: _____

Signature: _____

Date: _____