CLASS SPECIFICATION

FINANCIAL AID SYSTEMS SPECIALIST

Classified Position (Non-Exempt Status)
Classified Office, Technician & Business Services Salary Schedule – Range 69

DEFINITION

To perform a variety of technical application systems and business process support to Financial Aid; to maintain system setup and functionality to meet end user needs and to ensure program compliance with federal and state regulatory mandates and District and department policies and procedures; to troubleshoot and document system problems; to design, test, and maintain data reporting functions to enhance and support reporting requirements and data tracking needs; to serve as a liaison between the Information Systems (IS) Department, consultants, and staff with respect to Financial Aid systems; and to perform a variety of technical functions related to financial aid, institutional scholarships, and related programs.

DISTINGUISHING CHARACTERISTICS

This is the journey level in the single level Financial Aid Systems Specialist class. Incumbents initially perform the more routine duties assigned to positions in this class and work under close supervision. However, as experience is gained, incumbents are expected to perform the full range of duties as assigned with increasing independence.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Supervisor, Financial Aid Services.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Participate in the modification of existing financial aid system and/or the implementation of system upgrades by developing, writing, and disseminating procedures that utilize new or

changed processes and by testing and evaluating system modifications in response to operational, program, and/or regulatory changes.

Review financial aid operations, policies, and procedures; identify and integrate user needs and operational, programmatic, and/or regulatory changes with system set-up, upgrade, data processing, and reporting functions; propose solutions or modifications to improve processes and service levels.

Identify, analyze, and troubleshoot problems and issues related to the efficiency of automated financial aid and scholarship system software modules and related databases.

Design, create, and run reports to meet regulatory requirements; set up report definitions to ensure proper export/import of data.

Ensure integration of the financial aid system with other system modules and external data systems by conducting comparative analysis and validation of the data.

Create and maintain technical documentation including user guides and training and procedure manuals.

Serve as a liaison between Financial Aid staff, IS, and consultants; communicate business and system needs to IS and consultants; ensure the design, configuration, and implementation of financial aid modules meets business and system requirements.

Function as a team member on technology implementation teams related to financial aid; provide expertise on financial aid programs and regulatory requirements.

Administer assigned financial aid program including coordination of program reporting, accountability, outreach and marketing, and regulatory compliance; analyze and ensure compliance with federal and state guidelines and District policies and procedures; act as liaison with other departments and outside agencies in the processing, tracking, and monitoring of program requirements and documentation.

Attend and participate in professional development and training

activities.

Prepare and maintain accurate and timely reports; perform monthly and annual reconciliation of assigned programs.

Hire, train, and assign work to student workers; process and review work study student timesheets; may function as work study coordinator as required.

Build and maintain positive working relationships with co-workers, other district employees, and the public using principles of good customer service.

Foster an environment that embraces diversity, integrity, trust, and respect.

Be an integral team player, which involves flexibility, cooperation, and communication.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices used in the analysis and integration of business processes and ERP systems associated with financial aid programs.

Basic principles of database design and data management and reporting.

Eligibility requirements of a variety of state and federal financial aid programs.

Public benefits and entitlement programs.

Pertinent federal, state, and district laws, rules and regulations, including Title IV program fund regulations.

Methodology of financial aid needs analysis and packaging.

Applicable financial aid databases.

Ability to:

Communicate with Financial Aid staff to identify and translate information needs into system requirements.

Communicate business information system needs to IS staff and consultants for the design, development, and/or enhancement of system applications.

Assist end users on a wide variety of system issues, evaluate alternatives, and make and implement sound recommendations.

Develop procedural documentation and train end users.

Design, create, and run reports.

Evaluate and validate financial aid systems functionality

Read and interpret financial statements, income tax reports, and related documents, and advise students regarding financial aid application procedures, eligibility, and requirements.

Intermittently, review and evaluate documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve issues for the public and with staff.

On a continuous basis, sit at desk for long periods of time or stand at public counter; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Determine eligibility for a variety of federal, state, and district grants, services, loans, and other financial assistance.

Research regulatory information and resolve complex financial questions.

Utilize modern office equipment, including computers and relevant software

programs. Perform arithmetic calculations and reconcile financial data.

Use sound judgment in recognizing scope of authority.

Operate and use modern office equipment including computers and applicable software.

Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Utilize appropriate safety procedures and practices for assigned duties.

Communicate effectively orally and in writing.

Relate effectively with people of varied academic, cultural, and socio-economic backgrounds using tact, diplomacy, and courtesy.

Establish and maintain effective, cooperative, and collaborative working relationships with others.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Three years of increasingly responsible application systems experience including the use and troubleshooting of ERP applications and supporting data reporting functions, preferably in Financial Aid or similar student services office.

Education:

Equivalent to an Associate's degree from an accredited college with major coursework in computer science, business, general education, or a related field.

EEO Category: Technical/Paraprofessional

Date Approved: September 19, 2018