

Financial Aid Specialist, Categorical - Bilingual Preferred  
(Spanish)

South Orange County Community College District

Direct Link: <https://www.AcademicKeys.com/r?job=236892>

Downloaded On: Dec. 21, 2024 11:21am

Posted May 31, 2024, set to expire Jan. 28, 2025

<b>Job Title</b>	Financial Aid Specialist, Categorical - Bilingual Preferred (Spanish)
<b>Department</b>	Financial Aid
<b>Institution</b>	South Orange County Community College District South Orange County Community College District, California
<b>Date Posted</b>	May 31, 2024
<b>Application Deadline</b>	Open until filled
<b>Position Start Date</b>	Available immediately
<b>Job Categories</b>	Classified Staff
<b>Academic Field(s)</b>	Financial Aid
<b>Job Website</b>	<a href="https://wd5.myworkdaysite.com/en-US/recruiting/socccd/SOCCCD/job/Saddleback-College/Financial-Aid-Specialist--Categorical---Bilingual-Preferred--Spanish-_REQ12162">https://wd5.myworkdaysite.com/en-US/recruiting/socccd/SOCCCD/job/Saddleback-College/Financial-Aid-Specialist--Categorical---Bilingual-Preferred--Spanish-_REQ12162</a>

**Apply By Email**

**Job Description**

**Title:**Financial Aid Specialist, Categorical - Bilingual Preferred (Spanish)

**Job Category:**CSEA

**Job Opening Date:**May 30, 2024

**Job Closing Date:**June 25, 2024



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**Location:**Saddleback College

**Work Location:**Mission Viejo, CA

**Department:**Financial Aid

**Pay Grade, for more information click on this link:**

<https://www.socccd.edu/departments/human-resources/contracts-and-salary-schedules>

**Pay Rate Type:**Monthly

**Work Days:**Monday - Friday

**Work Hours:**8:00am - 5:00pm (Schedule and Shift are subject to change in accordance with the departments needs.)

**Hours Per Week:**40

**Percentage of Employment:**100%

**Months of Employment:**12 Months

**Salary:**Starting at \$5,389 per month, plus 2% bilingual stipend (if applicable)

**Required Documents:**

Resume and Optional Document: Cover Letter

**Job Description:**

**C.S.E.A. Classified Bargaining Unit Salary Range 125**



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**Application materials must be received by 11:59 pm 06/24/2024**

**Required Document: Resume and Optional Document: Cover Letter**

**Applications missing the required documents will not be considered.**

**Please Note: Employment in this position is contingent upon funding by SEAP (Student Equity and Achievement Program)**

***This categorical funded position will be primarily focused on developing and coordinating outreach and inreach activities aimed at educating and assisting students in understanding and accessing financial aid resources.***

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 direction from an appropriate level manager or administrator, performs a variety of complex duties involved in providing financial aid assistance and recommending available alternatives for students; processes and verifies student financial aid applications; develops and awards student financial aid packages in accordance with prescribed policies, procedures, regulations, and guidelines. Participates in the coordination of specific financial aid programs, Work-Study, institutional scholarships, and loan programs. Provides training and work direction to temporary staff and student workers. Participates in Financial Aid outreach activities and events.

### **DISTINGUISHING CHARACTERISTICS**

This is the journey level class within the Financial Aid series. A Financial Aid Specialist is distinguished from a Financial Aid Assistant in that an incumbent in the former class is responsible for more complex technical decisions, requiring advanced technical knowledge and experience. Employees within this class are distinguished from the Senior Financial Aid Specialist in that the latter serves as a lead over lower-level financial aid staff. Employees at this level use District, College, State, and Federal

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regulations, policies, and procedures to provide accurate information and services to students and are fully aware of the operating procedures and policies of the work unit. Employees at the Financial Aid Specialist level are required to be fully trained in all procedures related to assigned area of responsibility.

### **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.

- Perform the duties of the lower-level classifications within the assigned area, as required.
- Provide assistance and advisement to students applying for federal, state, and institutional financial aid programs; research available options and sources; discuss various eligibility criteria and explain ineligibility as necessary; interpret and explain Financial Aid policies and procedures.
- Review student documentation and information to ensure compliance with federal methodology, published regulations, and institutional policies and procedures; utilize independent judgment to investigate and assist students in resolving conflicting information.
- Process, package, determine eligibility, and award for federal and state financial aid programs; calculate financial need and determine applicant eligibility for all appropriate aid programs. Prepare and award financial aid packages, send award notifications, advise students on terms and conditions, including Master Promissory Notes, disclosure statements, and requirements and limitations of awards; apply independent judgment to ensure accurate disbursement of state, institutional, and federal funds.
- Review individual awards for accuracy and adjust based on unmet need, budget, and residency; monitor awards carefully to avoid over-awards and ensure compliance with award eligibility; counsel students on debt management and consequences of loan default; ensure exit loan counseling is completed.
- Exercise professional judgment in evaluating students with special circumstances on a case-by-case basis; review supporting documentation and make appropriate decisions when reviewing student appeals due to extenuating circumstances; make appropriate adjustments to financial aid application data elements, as needed.
- Determine possible changes to previous student eligibility based on changes to financial aid application records. Communicate to students and staff regarding changes to eligibility, request supporting documentation to resolve conflicting information, and place holds on financial aid disbursements until conflicts are resolved.
- Utilize appropriate systems/programs to report enrollment status and award eligibility for various

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programs; maintain accurate records of funds disbursed for reconciliation; reconcile disbursements; retrieve and review accounts receivable reports; research and evaluate information from various reports and act on information obtained, as necessary.

- Participate in the coordination of specific programs within Financial Aid; demonstrate knowledge of, interpret, and follow federal, state, and institutional laws and guidelines to determine eligibility.
- Apply and review Satisfactory Academic Progress (SAP) standards for each student applying for financial assistance according to federal and institutional regulations; review and evaluate SAP to determine eligibility for financial assistance; calculate and adjust awards based on SAP results; monitor continued aid eligibility; notify, interpret, and explain results to students; participate in the SAP appeals process, as directed; notify students of appeal status/outcome.
- Use District, College, State, and Federal regulations, policies, and procedures to provide accurate information and services to students and others; research and interpret regulations for Federal, State, and institutional financial aid programs; maintain current knowledge and stay up to date on program requirements and changes to financial aid services and options for students.
- Abide by all confidentiality practices required by department, state, and federal policies, laws, rules, and regulations, including FERPA and ADA; immediately report suspicious data or circumstances to supervisor.
- Participate in the coordination and planning of, and attend, various community relations and outreach activities targeted at new or returning students and/or potential students; may represent the College at on- and off-campus meetings, conferences, community events, and high school career and college fairs; assist in the distribution of promotional and marketing materials related to Financial Aid.
- Work closely with other offices in the coordination of the scholarship program; assist in reviewing scholarship applications; review appropriate spreadsheets and maintain accurate records of the disbursement of funds and student eligibility; assist in the coordination of scholarship ceremony; assist with notifying recipients.
- Serve as liaison, and assist with the coordination of services, functions, and activities with other College/District departments, including those at off-site locations; facilitate communications between assigned supervisor, other administrators, students, academic and classified staff, other offices, educational institutions, public agencies, and the general public; interact and relay information, questions, and decisions regarding area of assignment.
- Establish and maintain cooperative working relationships with students, staff, and faculty, as well as various outside groups associated with or servicing the program to ensure efficient, effective, and correct implementation of departmental objectives.
- Maintain departmental area(s) in a safe, clean, and orderly environment; assure compliance with established safety procedures and regulations; seek to resolve any disruptive behavior; refer unresolved problems to supervisor; may call Campus Police in emergency situations.

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- Provide training, mentoring, and work direction to lower-level staff, temporary staff, and assigned student workers; review and validate completed work for accuracy.

Perform related duties as required.

## QUALIFICATIONS

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:

- Operational characteristics, principles, theories, practices, philosophy, services, goals, objectives, and activities of the functions, programs, and operations of the assigned area.
- Pertinent federal, state, and local laws, codes, policies, procedures, rules, restrictions, and regulations of the assigned area, including FERPA and the Americans with Disabilities Act; confidentiality requirements when dealing with personal and sensitive student information; legal requirements related to area of assignment.
- Terminology, techniques, equipment, and materials related to the assigned area.
- College administrative services, student services and financial aid programs; District and College organization, operations, policies, and objectives.
- Methods and techniques used in the performance of duties and responsibilities specific to the area of assignment.
- Federal and State programs that provide financial assistance to students and student eligibility requirements.
- Methods and techniques of advising students regarding financial aid options and programs.
- Specialized financial aid software.
- Current office practices, procedures, methods, and computer equipment, software, and applications related to the work, including word processing, desktop publishing, spreadsheets, and databases.
- Principles and practices used to establish and maintain files and information retrieval systems; principles and practice of recordkeeping, and principles and procedures of business letter writing and report preparation.
- Generating and analyzing reports from systems and databases.
- Work organization principles and practices.
- Effective written and oral communication skills including correct English usage, grammar, spelling, punctuation, and vocabulary.

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- Diverse academic, socioeconomic, cultural, disability, and ethnic backgrounds of community college students.
- Techniques for providing a high level of customer service including methods and techniques of proper telephone etiquette.
- Interpersonal skills using tact, patience, and courtesy.
- Techniques to facilitate effective interaction with people on an individual or group basis.
- Principles and techniques used in public relations.
- Information and research resources available related to areas of assignment.
- Occupational hazards and standard safety policies and procedures.
- Principles and practices of providing training and guidance to lower-level staff and student workers.

Ability to:

- Learn, understand, and effectively operate electronic financial aid processing software systems accurately and expeditiously.
- Verify a variety of financial data and evaluate student ability to pay for education.
- Prepare and award well balanced financial aid packages based upon determined needs.
- Respond to difficult inquiries and requests from students regarding financial aid options and programs.
- Identify student needs and assist students in locating financial alternatives.
- Assist students in locating appropriate resources; provide assistance to students on matters related to Financial Aid programs.
- Learn and understand the organization and operation of the assigned department as necessary to assume assigned responsibilities; understand, explain, and apply administrative and office policies and procedures as well as pertinent laws, codes, regulations, and ordinances; work within the policies, functions, and requirements of area of assignment; assure compliance with State and federal laws and District policies. Interpret and apply federal, state, and local policies, procedures, laws, and regulations.
- Perform a variety of duties and activities in support of the assigned area; prepare, generate, and proofread a variety of documents, forms, reports, and other written materials; disseminate information as appropriate; type or enter data at a speed necessary for successful job performance; maintain accurate filing, record keeping, and tracking systems; apply excellent organization skills and attention to detail; utilize electronic technology to correspond with others and to maintain assigned calendars, schedules, and appointments.
- Operate office equipment including hardware, software, and devices supporting word processing, database management, and spreadsheets; type or enter data at a speed necessary for successful job performance; apply excellent organization skills and attention to detail; effectively



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utilize computer applications and equipment in the performance of duties; adapt to changing technologies and learn functionality of new equipment and systems; participate in updating the departmental website, as required.

- Compile data for various records; maintain accurate and up-to-date files and records for assigned program; develop and monitor various logs, accounts, and files for current and accurate information; verify accuracy of information, researching discrepancies and recording information.
- Communicate clearly and concisely, both orally and in writing in English; use correct English usage, grammar, spelling, punctuation, and vocabulary; understand and follow oral and written directions in English; listen actively and effectively.
- Develop, maintain, and foster effective working relationships involving interactions and communications personally, by phone, and in writing with a variety of individuals and/or groups from diverse backgrounds on a regular, ongoing basis.
- Interact extensively with and respond to requests and inquiries from students, faculty, staff, and public; effectively present information in person or on the telephone to students, staff, or the public; provide excellent customer service.
- Work with and exhibit sensitivity to and understanding of the varied racial, ethnic, cultural, sexual orientation, academic, socio-economic, and disabled populations of community college students.
- Work effectively under pressure with frequent interruptions and a high degree of public contact on a variety of tasks concurrently while meeting established deadlines and changing priorities; concentrate on detailed tasks for extended periods of time; work confidentially, independently, and collaboratively.
- Exercise good judgment, discretion, and personal initiative in resolving confidential, difficult, and sensitive situations, according to established policies and procedures; use sound judgment in recognizing scope of authority; maintain critical and sensitive information, records, and reports confidentially.
- Provide training and work direction to assigned lower-level, temporary, and student staff.
- Report to work on a regular and consistent basis, as scheduled, to assigned job.
- Work occasional evening/weekend shifts, as required.
- Maintain the cleanliness, safety, and organization of assigned area; ensure adherence to safe work practices and procedures; monitor activities in assigned area and enforce policies for proper use and behavior.
- Attend and participate in trainings, meetings, workshops, and conferences; learn new state and federal laws, rules, and regulations pertaining to area of assignment; participate in the development of new/revised procedures to accommodate changes; attend and participate in diversity, equity, and inclusion trainings and events; maintain compliance with online coursework and other mandatory trainings and certifications as directed by supervisor.





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### **EDUCATION AND EXPERIENCE GUIDELINES**

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:

#### Education/Training:

Equivalent to two years of college level course work in finance, accounting, business administration, public administration, or a related field.

#### Experience:

Two years of specialized clerical or technical experience within a college student services office, preferably in Financial Aid.

### **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. Duties are typically performed at a desk or computer terminal; subject to noise from office equipment operation; frequent interruptions and contact in person and on the telephone with students, academic and classified staff and others. At least minimal environmental controls are in place to assure health and comfort.

#### 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.



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

**SPECIAL COVID-19 NOTICE:**

Interviews may be held in-person (following all necessary precautions) or in a virtual format. Employees must reside in California while employed with the South Orange County Community College District (SOCCCD), even during remote work. Thank you for your continued interest in working at the SOCCCD.

The SOCCCD is committed to protecting the health and wellbeing of students, faculty, staff, administrators, and the communities it serves. More information can be found on our District website by visiting <https://www.socccd.edu/communications/covid-19-information>.

**NOTICE TO ALL CANDIDATES FOR EMPLOYMENT:**

The Immigration Reform and Control Act of 1986, Public Law 99-603, requires that employers obtain documentation from every new employee which authorizes that individual to accept employment in this country. SOCCCD will not sponsor any visa applications.

**PLEASE NOTE:**

A California Public Employees Retirement System (CalPERS) retiree may not accept employment until after the first 180 days of retirement. Anyone retired from CalPERS accepting permanent employment with this District will be required to reinstate as an active CalPERS member. Please contact CalPERS for additional information regarding your retirement status.

Any active vested member of California State Teachers Retirement System (CalSTRS), who accepts employment with the District to perform service that requires membership in CalPERS, is eligible to elect to continue retirement system coverage under CalSTRS



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**DISABILITY ACCOMODATIONS:**

If you require special accommodations in the application and/or selection process, please notify District Human Resources at least two (2) business days prior to the Job Close Date/Initial Screening Date, by either calling (949) 582-4850 or sending an e-mail to [hrinfodesk@socccd.edu](mailto:hrinfodesk@socccd.edu).

**ATTENDANCE REQUIREMENT:**

Report to work on a regular and consistent basis, as scheduled, to assigned job.

**CAMPUS CRIME AND SAFETY AWARENESS:**

Information regarding campus crime and safety awareness can be found at [www.saddleback.edu](http://www.saddleback.edu) or [www.ivc.edu](http://www.ivc.edu). Paper copies are available in the District Human Resources office upon request.

**EEO/AA Policy**

**DIVERSITY, EQUITY, INCLUSION, AND EQUAL EMPLOYMENT OPPORTUNITY (EEO):**

The South Orange County Community College District is committed to creating an academic and work environment that fosters diversity, equity and inclusion and equal opportunity for all, and ensures that students, faculty, management and staff of all backgrounds feel welcome, included, supported, and safe. Our culture of belonging, openness, and inclusion, makes our district a unique and special place for individuals of all backgrounds.

Our District and our colleges are looking for equity and inclusion-minded applicants who represent the full diversity of California and who demonstrate a sensitivity to the understanding of diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds present



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within our community. When you join our District, you can expect to be part of an exciting, thriving, equity-focused, and inclusive community that approaches higher education with the lens of social justice and collaboration among students, faculty, staff, administration, and community partners. In deciding whether to apply for a position with our District, you are strongly encouraged to consider whether your values align with our District's mission and goals for EEO, Diversity, Equity, and Inclusion.

### **SOCCCD IS AN EQUAL OPPORTUNITY EMPLOYER**

#### **Contact Information**

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

#### **Contact**

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