

Financial Aid Assistant, Categorical  
South Orange County Community College District

Direct Link: <https://www.AcademicKeys.com/r?job=249431>

Downloaded On: Feb. 12, 2025 6:26am

Posted Nov. 22, 2024, set to expire Mar. 24, 2025

**Job Title** Financial Aid Assistant, Categorical

**Department**

**Institution** South Orange County Community College District  
Mission Viejo, California

**Date Posted** Nov. 22, 2024

**Application Deadline** Open until filled

**Position Start Date** Available immediately

**Job Categories** Classified Staff

**Academic Field(s)** Financial Aid

**Job Website** <https://www.schooljobs.com/careers/socccd/jobs/4739228/financial-aid-assistant-categorical>

**Apply By Email**

**Job Description**

**Application Instructions:**

- Complete all sections and fields on the application and attach all required documents – incomplete applications may not be considered.
- Include all relevant education, training, and/or experience on the application.
- Do not include any personally identifiable, confidential, or otherwise unrequested information that does not pertain to job related factors (e.g., social security number, date of birth, pictures, etc.) on your application or attached documents.
- For job postings with a close date, all applications received by 11:59 PM (Pacific Time) on

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the job posting close date, will receive consideration.

- For job postings with an initial screening date, all applications received by 11:59 PM (Pacific Time) on the job posting initial screening date, will receive priority consideration; however, typically the job posting will remain open, and continue to accept applications, until the position is filled.
- For job postings requiring professional references, include at least three (3) professional references from the following categories:
  1. Current department chair(s) (for faculty) or supervisor(s);
  2. Previous department chair(s) (for faculty) or supervisor(s) (from within the past five (5) years);
  3. Master's thesis or Doctoral Dissertation advisor or supervisor (for faculty);
  4. Colleague(s) or co-worker(s) who can address professional competency and skills relevant to the position; and/or
  5. Other professional references.

Please note, professional references are typically contacted when a candidate is selected for, or as a finalist for, a position.

## Description

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 general supervision by the appropriate level Manager or Administrator, serves as the initial point-of-contact for the Financial Aid Office. Provides information and assistance to students, parents, and the public in completing Financial Aid related applications and documents; ensures Financial Aid records are updated in a timely manner; ensures Financial Aid documentation is

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completed appropriately and accurately; ensures that student Financial Aid files contain all required documentation for higher level staff to review and make award decisions; performs a variety of administrative office support duties of a general or specialized nature. Provides training and work direction to temporary staff and student workers. Participates in Financial Aid outreach activities and events.

### **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.

Performs a variety of clerical and technical duties in support of the financial aid program.

Serve as initial contact for assigned area; provide a high level of customer service; greet and assist students, faculty, staff, and the general public; respond to routine questions and requests for information; convey messages; refer callers to appropriate faculty or staff for further assistance as needed; communicate information where judgment and knowledge of policies and procedures are required.

Provide documents, forms, applications, materials, and other information in response to requests for information related to financial aid; direct students to appropriate resources and student services as needed.

Provide technical assistance and information to students regarding financial aid programs and services; assist students with understanding and completing various types of applications, forms, and other financial aid documents; explain policies, procedures, special requirements, restrictions, and supporting documentation needed; provide information regarding eligibility requirements; verifies student application status; explains deadlines and disbursement dates; refers students to other agencies as necessary to obtain required documentation.

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Review materials, applications, records, files, and reports for completeness, accuracy, and compliance with established regulations and procedures; apply applicable policies and procedures in determining completeness of applications, records, files, and reports; collect and process appropriate information; scan and upload documentation as necessary to complete files; complete housing and agency verifications.

Assist students to understand the relationship between financial aid awards and course load, grades, and other student achievement factors.

Assist higher-level staff with data entry of student records and access to reports and data; assist with monitoring student compliance with program requirements; assist higher-level staff on specific programs as assigned.

Set up and maintain financial aid student records and other records by reviewing and updating pertinent data under prescribed guidelines.

Operate a variety of office equipment and machines; learn to use new technology as necessary to perform duties; utilize electronic technology to correspond with others and to maintain assigned calendars, schedules, and appointments; utilize various computer applications and software packages.

Type, word process, and proofread a variety of documents and forms including general correspondence, agendas, reports, and memoranda; disseminate information as appropriate; utilize various computer applications and software packages; prepare and generate reports.

Compile and maintain 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; organize and maintain filing systems.

May assist in preparing a variety of documents for publications and marketing pieces including brochures, flyers, event programs, and related materials; order brochures, applications, and forms as necessary; receive, sort, and deliver materials.

Assist in maintaining office supplies and resources; assure proper functioning of office equipment; maintain adequate inventory levels of supplies and equipment.

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Attend a variety of meetings, workshops, conferences, presentations, and training sessions as required; maintain compliance with mandatory trainings and certifications (i.e., FERPA, etc.) as directed by supervisor; attend and participate in diversity, equity and inclusion trainings and events.

Participate in the 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.

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.

Maintain current knowledge and stay up to date on program requirements and changes to financial aid services and options for students by attending and participating in trainings, workshops, and conferences and learning new state and federal laws, rules, and regulations pertaining to financial aid; participate in the development of new/revised procedures to accommodate changes; maintain working knowledge of standard operating procedures within the area of assignment.

Use District, College, State, and Federal regulations, policies, and procedures to provide accurate information and services to students and others; abide by all confidentiality practices required by department, state, and federal policies, laws, rules, and regulations, including FERPA and ADA.

Participate in updating the departmental website, as required.

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; 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.

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Assist in coordinating the efforts of the assigned office with other departments and student services; communicate between Financial Aid office and other campus departments.

Provide training, mentoring, and work direction to assigned student workers and lower-level staff; 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:**

Methods and standards used in processing Financial Aid paperwork.

Financial Aid resources available to students.

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; basic principles and procedures of business letter writing and report preparation.

Work organization principles and practices.

Effective written and oral communication skills including correct English usage, grammar, spelling, punctuation, and vocabulary.

Diverse academic, socioeconomic, cultural, disability, and ethnic backgrounds of community college students.

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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.

Pertinent federal, state, and local laws, codes, and regulations, 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.

Principles and techniques used in public relations.

Goals and objectives of the assigned project or program area.

Information and research resources available related to areas of assignment.

Methods and techniques used in the performance of duties and responsibilities specific to the area of assignment.

Operational characteristics, services, and activities of the functions, programs, and operations of the assigned project or program area.

Philosophy, goals, and objectives of the assigned area; eligibility requirements; activities, operations, rules, regulations, requirements, and restrictions related to area of assignment; terminology, techniques, equipment, materials, principles, theories, practices, and procedures related to the assigned area.

Occupational hazards and standard safety policies and procedures.

College administrative services and financial aid programs; District and College organization, operations, policies, and objectives.

Principles and practices of providing training and guidance to temporary staff and student workers.

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### **Ability to:**

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, regulations, and ordinances; work within the policies, functions, and requirements of area of assignment.

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.

Perform a variety of office support and clerical duties and activities of in support of the assigned area; 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; maintain accurate filing, record keeping, and tracking systems; apply excellent organization skills and attention to detail; compose and prepare correspondence and memoranda; maintain filing systems; prepare documentation, reports, and other written materials.

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.



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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 temporary and student staff.

Effectively utilize computer applications and equipment in the performance of duties; adapt to changing technologies and learn functionality of new equipment and systems.

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

Work some 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.

Participate in trainings and meetings on-site and off-site as required.

### **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 the completion of the twelfth grade. Completion of college level course work in business administration or a related field is highly desirable.

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**Experience:**

Two years of specialized clerical or office experience preferably involving extensive public contact.

**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, typically 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, staff, and others.

**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; to verbally communicate to exchange information; and may occasionally travel to other offices or locations to attend meetings or to pick up or deliver materials.

**Vision:** See in the normal visual range with or without correction.

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

**Supplemental Information**



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Range **118** of the **CSEA** Salary Schedule.

Initial Screening Date: **December 09, 2024**

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

Work Schedule: **Monday, Tuesday, Thursday, Friday (8:00 AM - 5:00 PM)** and **Wednesday - (10:00 AM - 7:00 PM)** - Schedule and shift are subject to change in accordance with the departments needs.

Hours per Week: **40**

Months per Year: **12**

**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 offsite work.

The SOCCCD is committed to protecting the health and wellbeing of students, faculty, staff, managers, and the communities it serves. More information can be found on the SOCCCD 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. The SOCCCD will not sponsor any visa applications.



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**California Public Employees Retirement System and California State Teachers Retirement System:**

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 the SOCCCD 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 SOCCCD to perform service that requires membership in CalPERS, is eligible to elect to continue retirement system coverage under CalSTRS

**Disability Accommodations:**

If you require special accommodations in the application and/or evaluation process, please notify Human Resources at least two (2) business days prior to the job posting close or initial screening date, by either calling (949) 582-4850 or sending an e-mail to [hrinfodesk@socccd.edu](mailto:hrinfodesk@socccd.edu).

**Attendance Requirement:**

All SOCCCD employees are required to 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.ivc.edu](http://www.ivc.edu) or [www.saddleback.edu](http://www.saddleback.edu). Paper copies are available in the Human Resources office upon request.



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### **Diversity, Equity, Inclusion and Equal Employment Opportunity:**

The SOCCCD is committed to creating an academic and work environment that fosters diversity, equity, and inclusion (DEI) and equal employment opportunity (EEO) for all, and ensures that students, faculty, staff, and managers of all backgrounds feel welcome, included, supported, and safe. Our culture of belonging, openness, and inclusion, makes the SOCCCD a unique and special place for individuals of all backgrounds.

The SOCCCD is 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 within our community. When you join the SOCCCD, 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, managers, and community partners. In deciding whether to apply for a position at the SOCCCD, you are strongly encouraged to consider whether your values align with the SOCCCD's mission and goals for DEI and EEO.

### **THE 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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