

Financial Aid Specialist, (Two (2) or More Positions)
South Orange County Community College District

Direct Link: <https://www.AcademicKeys.com/r?job=264303>

Downloaded On: Oct. 23, 2025 8:47pm

Posted Oct. 23, 2025, set to expire Feb. 21, 2026

Job Title Financial Aid Specialist, (Two (2) or More Positions)

Department

Institution South Orange County Community College District
Mission Viejo, California

Date Posted Oct. 23, 2025

Application Deadline Open until filled

Position Start Date Available immediately

Job Categories Professional Staff

Academic Field(s) Financial Aid

Job Website <https://www.schooljobs.com/careers/socccd/jobs/5120165/financial-aid-specialist-two-2-or-more-positions>

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 the job posting close date, will receive consideration.

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- 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 direction from an appropriate level manager or administrator, performs a variety of

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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 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,

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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 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

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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.

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.

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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.

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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.

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.

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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 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.

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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

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diversity, equity, and inclusion trainings and events; maintain compliance with online coursework and other mandatory trainings and certifications as directed by supervisor.

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.

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

Supplemental Information

Range **125** of **CSEA** Salary Schedule

Work schedule: **Monday - Friday (8:00 AM - 5:00 PM)**- Schedule and shift are subject to change in accordance with the department's needs.

Required Documents: **Resume and Cover Letter**

Applications missing the required documents will not be considered.

Hours Per Week : **40**

Months: **12**

NOTE: One position is Categorical Funded (Employment in this position is contingent upon

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funding by BFAP (Board Financial Assistance Program). One position is 100% funded by General funds.

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 South Orange County Community College District (SOCCCD) will not sponsor any visa applications.

Employees must reside in California while employed with the SOCCCD.

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

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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 hrrinfodesk@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 or www.saddleback.edu. Paper copies are available in the Human Resources office upon request.

Non-Discrimination Notice:

The SOCCCD provides access to its services, classes, and programs without regard to national origin, immigration status, religion, age, gender, gender identity, gender expression, race, ethnicity, color, medical condition, military and veteran status, genetic information, ancestry, sexual orientation, marital status, physical or mental disability, pregnancy, or because they are perceived to have one or more of the foregoing characteristics, or based on association with a person or group with one or more of these actual or perceived characteristics.

California Fair Chance Act:

The SOCCCD will consider qualified applicants with a criminal history pursuant to the California Fair Chance Act. You do not need to disclose your criminal history or participate in a background check until a conditional job offer is made to you. After making a conditional offer and running a background check, if the SOCCCD is concerned about a conviction that is directly related to the job, you will be given the chance to explain the circumstances surrounding the conviction, provide mitigating evidence, or challenge the accuracy of the background report.

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Diversity, Equity, Inclusion and Equal Employment Opportunity:

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.

The SOCCCD is committed to ensuring that all students have the opportunity to succeed in their classes and as such, to eliminating institutional barriers that disproportionately impact students of color. Irvine Valley College and Saddleback College are deeply committed to fostering an inclusive environment where students, staff, and faculty from diverse backgrounds can thrive academically and professionally.

Irvine Valley College (IVC) serves approximately 21,584 students, reflecting a rich diversity: 41% Asian, 2% Black/African-American, 21% Hispanic/Latino, 8% Southwest Asian and North African, 5% two or more races, and 21% White in Fall 2024.

Similarly, Saddleback College (SC) serves around 25,789 students, with demographics showing 12% Asian, 2% Black/African-American, 29% Hispanic/Latino, 5% two or more races, and 47% White in Fall 2024.

These numbers underscore the importance of our commitment to eliminating equity gaps across all student demographics through implementing dynamic, student-centered practices and policies. To support the academic and career success of our diverse student body, we seek a candidate who will actively contribute to our mission of inclusivity and support. The ideal candidate's values will align with SOCCCD's goals for Diversity, Equity, and Inclusion (DEI) and Equal Employment Opportunity (EEO).

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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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