

**FINANCIAL AID CLERK II**  
(Bargaining Unit Position)  
(Range 25)

**DEFINITION**

Under general supervision, disseminate information to the community and to students regarding the financial aid available; receive and process applications for financial aid and assist students and staff with all matters related to their eligibility and application; and to perform other related duties as required.

**DISTINGUISHING CHARACTERISTICS**

The Financial Aid Clerk II class is distinguished from other classes in the Financial Aid positions of the Student Support Service series in that the incumbent must possess knowledge of the federal and state regulations and guidelines concerning financial aid programs; trains and oversees the work of Financial Aid Clerks I; and assists with management of the Financial Aid Program.

Incumbents in this position support student learning outcomes and institutional effectiveness by ensuring state and federal compliance are met and encouraging student success through the Financial Aid process.

**ESSENTIAL FUNCTIONS**

- Disseminate program information for the financial aid programs, including BOGW, Cal Grant, FWS, EOPS, FFELP, Pell Grant, Emergency Loans, and Scholarships;
- Distribute FAFSA's and answer specific questions regarding completion of the applications;
- Assist students with Stafford Student Loan and other loan, grant and scholarship applications;
- Monitor Federal Workstudy Program including employee packet, time cards, and availability of funds;
- Coordinate short term ASCC Emergency Book Loan Program;
- Perform all clerical work related to Financial Aid awards;
- Research information;
- Arrange Financial Aid Committee meetings and make appointments for the Director and Specialists;
- Complete Financial Aid Transcripts;
- Process Stafford Student Loan checks;
- Advise students in applying for Financial Aid;
- Collect and analyze data;
- Assume responsibility for ordering supplies and maintaining office inventory;
- Administer COTOP (Chancellor's Office Tax Offset Program) for financial aid debts;
- Administer the Board On Governors Fee Waiver (BOGW) including eligibility determination and related clerical tasks;
- Trouble shoot financial aid related problems with other agencies, including the California Student Aid Commission, the U.S. Department of Education, various scholarship donors, Stafford Loan lenders, and the county Department of Social Services;
- Facilitate program coordination with other key campus offices including the Business Office, Admissions and Records, Bookstore, and the Assessment Office;
- Perform other related duties as required.

ESSENTIAL FUNCTIONS OF PARTICULAR POSITIONS WITHIN CLASSIFICATIONS MAY VARY BECAUSE JOB DUTIES MAY VARY BY WORK LOCATION.

## **QUALIFICATIONS**

### **Education:**

#### **Required**

- Two years of college level course work including courses in such areas as office practice or management, record keeping, and/or communication skills;

#### **Preferred**

- Associate degree.

### **Experience:**

- Two years of experience working with financial aid programs which may include employment as a student in a financial aid office or general clerical experience with public contact.

### **Or any equivalent combination of education and experience.**

### **Knowledge of:**

- All federal and state financial aid programs including grants, loans and scholarships available to Cuesta College students;
- Office practices and equipment;
- English usage, spelling, grammar, punctuation, and vocabulary;
- Computer programs used in the administration of financial aid programs.

### **Ability to:**

- Identify needs, and make logical recommendations;
- Communicate and work effectively with students and parents;
- Utilize all capabilities of the Financial Aid documents tracking system;
- Operate office equipment, including but not limited to: 10-key calculator, keyboard (45 words per minute), computer keyboard, copying machine;
- Use English correctly both orally and in writing;
- Plan, organize, and prioritize duties and related tasks;
- Demonstrate a sensitivity to and understanding of the diverse academic, socioeconomic, cultural, and ethnic backgrounds of staff and students and of staff and students with physical and learning disabilities;
- Establish and maintain cooperative working relationships;

### **Physical ability to:**

- Read and comprehend printed matter and text and data on computer monitors;
- Communicate intelligibly and effectively via speech, telephone, written correspondence, and/or email;
- Lift and/or carry 25 pounds;
- Work or stand at a counter for extended periods of time;
- Work at a desk, conference table or in meetings of various configurations.

CCCUE Approval: 02/19/1999; 12/13/2011;  
Board of Trustees Approval: 03/03/1999; 01/04/2012;