

JOB TITLE: Student Financial Aid Clerk
DEPARTMENT: Financial Aid

CODE: B0011
EEO: Clerical and Secretarial
EE Class: Staff

Nature of Work

This is clerical and secretarial work for the student financial aid program. Work involves responsibility for assisting in the various elements of the financial aid program, requiring the application of a working knowledge of financial aid policies and procedures. The work requires heavy public contact with new and returning students and students' parents. Duties include assisting students in the completion of financial aid forms and in the processing of financial aid awards for students. The employee may exercise coordinative functions or supervision over student assistants.

Work is performed in accordance with policies, rules, and regulations, and with independence of action on routine matters. Deviations from established procedures are referred to the supervisor. The employee in this position reports to the Financial Aid Director on a daily basis; the department is under the supervision of the Dean of Student Services. Occasional evening work is required.

Illustrative Examples of Work

Types correspondence using word processing software; types, prints, and mails other documents, i.e. financial aid transcripts, various verification and certification forms.

Advises financial aid applicants of deadlines, application procedures, and types of financial aid available.

Assists students and parents in completion of financial aid application forms.

Explains financial aid policies and procedures to students.

Perform limited counseling duties to applicants and parents of applicants.

Receives financial applications; verify information for completeness and eligibility.

Process financial aid applications to the extent of technical ability.

Greet individuals calling in person or by telephone; refer caller to proper persons; gives out information; maintains appointment schedule; makes hotel and travel reservations.

Enter data in a computerized student record system.

Monitor inventory of department's supplies; prepare purchase requisitions to replenish departmental supplies; receives orders.

Prepare and maintain departmental files and financial aid applicant files.

Receives and distributes daily mail.

Coordinate and supervise typing and clerical tasks of student assistants by determining priority and checking completed work for adherence to standard procedures.

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Operates various office machines such as typewriter, mimeograph, computer, photocopier, fax, and calculator.
Perform related work as required.

Desirable Knowledge, Abilities, and Skills

Working knowledge of financial aid process and office procedures.
Knowledge of appropriate codes utilized in maintaining computerized student records.
Knowledge of current regulations pertinent to the release of student information.
Good knowledge of business English, spelling, punctuation, and arithmetic.
Excellent communications skills; ability to effectively convey information.
Ability to interact well with the public.
Some knowledge of office practices, procedures, systems, and equipment, including computer applications.
Skilled in typing.
Ability to maintain records, to assemble and organize data, and to prepare reports from such records.
Ability to make arithmetical computations with speed and accuracy.
Ability to recognize and maintain the confidentiality of records concerning the personal finances of financial aid applicants.
Considerable skill in establishing and maintaining effective working relationships with officials, employees, students, and associates; ability to effectively convey and exchange information.

Physical Demands

Sedentary work; exerts up to 10 pounds of force occasionally.
Ability to reach, bend, and stoop for the purpose of filing.
Ability to sit for extended periods.

Desirable Training and Experience

Completion of college level courses in secretarial science, accounting, business administration, or a related area, and experience in secretarial/clerical work; or an equivalent combination of training and experience.

This position description may not describe all duties, responsibilities and skills associated with this position. It is intended to portray the major aspects of the job. Other duties or skills may be required.