

FINANCIAL AID EXAMINER

DISTINGUISHING FEATURES OF THE CLASS: This work involves responsibility for assisting students in applying for and obtaining student financial aid through federal or state government financial grant programs or scholarships. The work includes reviewing applications for completeness and accuracy, advising students on what type of grants are available and the appropriate forms and financial documentation needed to apply for each type. The incumbent is also responsible for monitoring special programs such as grant-funded programs, Day Care, and transportation operations. Duties are performed under general supervision with latitude allowed for the use of independent judgement in carrying out the duties of the position. Direct supervision may be exercised over clerical assistants. A Financial Aid Examiner does related work as required.

TYPICAL WORK ACTIVITIES:

- Assists students and their parents in completing applications for federal and state student financial assistance to insure that information and documentation required for each grant or scholarship has been included;
- Reviews grant applications processed through the Financial Aid Office to determine that the information is complete, correct, and consistent with every other piece of information provided;
- Informs applicants of the grants and scholarships available and the regulations, requirements, and procedures involved in the application process;
- Examines and verifies information provided on the financial application forms dealing with eligibility determinations to insure that all required documentation is available; performs validation of information reported on the application for a Basic Grant in accordance with Basic Grant regulations; contacts students and parents when further documentation is required;
- Monitors grant funded programs to assure compliance with reporting requirements, both programmatic and financial;
- Submits budget transfer requests necessary to fulfill and accomplish program goals;
- Maintains records of daily attendance of children enrolled in the Day Care program;
- Receives, records, deposits, and monitors tuition payments for Day Care and notifies the business office of delinquent accounts;
- Monitors transportation services keeping abreast with current state/federal school transportation rules and regulations;
- Prepares and maintains daily and cumulative records and reports of driving records, maintenance inspections, and other records as may be required by Department of Transportation;
- Prepares a variety of records and reports.

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS: Good knowledge of federal and state student financial aid programs and the rules, regulations, and procedures involved in the application process; good knowledge of student financial aid eligibility standards and requirements; good knowledge of the school's rules and regulations pertaining to matriculation, student academic standing, and registration status; knowledge of interviewing techniques to guide students through the application process and assist them in determining the best course of action to follow; good knowledge of safe driving practices; knowledge of standard transportation methods and of the operation of buses and motor vehicles; some knowledge of DOT regulations and requirements related to school bus transportation; ability to understand and carry out oral and written directions; ability to prepare and maintain records and reports; ability to establish and maintain cooperative relationships with others; good judgement; dependability; initiative; resourcefulness; physical condition sufficient to perform the essential functions of the position.

MINIMUM QUALIFICATIONS:

- A.) One year experience in examining, evaluating, or assisting in the completion of state and federal financial aid forms;

OR

- B.) Two years experience in examining, investigating, or evaluating claims for financial assistance, veterans or unemployment benefits, insurance, or a similar program operating under established criteria for eligibility.

NOTE: Successful completion of college credits from a regionally accredited or New York State registered college or university may be substituted for work experience as defined in (B) above, as follows: Thirty (30) semester hours is equivalent to one year of work experience; sixty (60) semester hours is equivalent to two years of work experience.

CATTARAUGUS COUNTY CIVIL SERVICE COMMISSION

Adopted: 9/18/97

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