

Jurisdictional Class: Competitive  
Adopted: March 24, 1998  
Revised: May 11, 2010

**FINANCIAL AID EXAMINER**

**DISTINGUISHING FEATURES OF THE CLASS:** This is responsible work for the management and administration of the organization's Financial Aid Program. The 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 work also involves responsibility for verifying academic status of applicants eligible for financial aid, and verifying or validating information provided by students and their parents depending on the requirements of each program. The work involves directing the Wide-Area-Network Computer Programs pertaining to financial aid and updating the system. Work is performed under general supervision with leeway allowed for the exercise of independent judgment in advising and assisting students in procedures, completing their applications, and in securing required documentation in a thorough and efficient manner. Work is reviewed through conferences and oral reports. The incumbent does related work as required.

**TYPICAL WORK ACTIVITIES:** (Illustrative only)

Manages and administers the organization's Financial Aid Program;  
Directs Wide-Area-Network Computer Programs pertaining to financial aid, keeps current all processing software, reports, input, and output, and up-dates software;  
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;  
Keeps current on all Federal and State Financial Aid laws, regulations, policies, and procedures and acts as resident expert for administration, faculty, and staff on all financial aid regulations;  
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, and contacts students and parents when further documentation is required;  
Provides information and referral for students interested in work-study or deferred payment programs or for special grants and loans administered by the administration;  
Reviews students' records to verify that every student eligible for financial aid has met federal and state regulations concerning admission and matriculation status and satisfactory academic progress as required;  
Attends training sessions and workshops to stay abreast of changes in federal and state guidelines, regulations, and application forms;  
Manages, monitors, and prepares financial aid program budgets;  
Develops long range plans and objectives for the office;  
Coordinates and provides data necessary for Federal and State agencies and certifies reports;  
Coordinates and prepares a variety of related reports;  
Determines and awards aid and authorizes Business Office to disburse aid to student accounts.

**FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES & 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 organizational rules and regulations pertaining to matriculation, student academic standing, and registration status;
- Good knowledge of interviewing techniques to guide students through the application process and assist them in determining the best course of action to follow;
- Ability to read, understand and interpret rules and regulations for purposes of advising and assisting applicants, administration, faculty, and staff;
- Ability to communicate clearly and concisely, both orally and in writing;
- Ability to relate well with others.

**MINIMUM QUALIFICATIONS:** Either:

- (a) Graduation from a regionally accredited or New York State registered college or university with a Bachelor's Degree in Business Management or Accounting; or
- (b) Graduation from a regionally accredited or New York State registered college or university with an Associate's Degree in Business Management or Accounting and two (2) years of experience in examining, evaluating, investigating, or assisting in the completion of state and federal financial aid forms in a post-secondary institution or a financial aid office; or
- (c) An equivalent combination of training and experience as defined by the limits of (a) and (b) above.