

**DATE: APRIL 2024**  
**FLSA: NON-EXEMPT**  
**SALARY: GRADE M**  
**CBA DESIGNATED: CLASSIFIED BARGAINING UNIT**

## **FINANCIAL AID ANALYST**

### **BASIC FUNCTION**

Provides specialized support to a diverse population of students and their families for the final and auditable award of all federal, state, and institutional aid funds; coordinates and meets critical dates and deadlines, ensuring accurate disbursement of all grants, loans, waivers, scholarships, and miscellaneous awards; interprets and applies changing rules in compliance with all mandated regulations for financial and institutional awards.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from assigned area supervisor. May provide lead direction to temporary staff and/or student workers.

### **CLASS CHARACTERISTICS**

This classification in the Financial Aid series is responsible for performing specialized services in the final determination of auditable awards of all federal, state, and institutional aid funds; incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Employees in the classification rely on experience and judgment to perform assigned duties and ensure efficient and effective services are provided to students seeking financial aid. Assignments are given with general guidelines. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS**

1. Reviews student documentation and information in compliance with federal methodology, published regulations, and institutional policies and procedures; utilizes independent judgment to investigate and resolve any conflicting information.
2. Accepts and determines the accuracy and validity of financial aid documents, including tax returns, legal documents, citizenship documents, specialized program forms, agency verification requests, and related materials.
3. Verifies, reviews, and calculates eligibility for appropriate aid programs; packages and awards aid for federal and state grant and loan funds for all applicants through automated and manual packaging procedures; audits and adjusts awards, as necessary.
4. Applies Satisfactory Academic Progress (SAP) standards for each student applying for financial assistance according to federal and institutional regulations; reviews and evaluates SAP reports to determine eligibility for financial assistance; calculates and adjusts awards based on SAP results; monitors continued aid eligibility; notifies, interprets, and explains results to students.
5. Responsible for processing, packaging, and awarding funding for students through multiple funding program options; monitors student funding on a continuous basis; conducts tasks specific to each funding source, such as counseling students on debt management, processing change of information forms, submitting disbursement authorizations, or related matters; audits and adjusts awards and reconciles disbursements as needed; and prepares and submits reports.
6. Coordinates the SAP Appeal program; monitors regulations; intakes appeal packets; prepares packets for review and examination; approves or denies SAP appeals; prepares communications to students and tracks information on a semester-by-semester basis.
7. Interprets current Student Educational Plans (SEP); develops and monitors academic plans for students approved for an SAP appeal through creation of an Approved Class List (ACL); monitors

- students' compliance with the ACL list; adjusts award packages based on eligibility.
8. Meets with students to discuss decisions on appeal packets, changes to their ACL, award updates, and disbursement information.
  9. Conducts end of semester reviews of all appeal-approved students to determine continued eligibility or loss of appeal status; assumes responsibility for student and staff communication, data entry, and award package updates for this group.
  10. Coordinates the scholarship program for students by marketing, providing workshops, screening, verifying eligibility, monitoring and adjusting awards, authorizing disbursements, auditing records, and compiling reports; acts as liaison to the RCCD Foundation and external partners.
  11. Reports and maintains the process of notifying and monitoring students who are in overpayment status; reports students who failed to make payment on the National Student Loan Data System (NSLDS) by verifying information from the Department of Education with respect to grant and loan overpayments and/or defaults; completes hold process for students who fail to repay Cal Grant.
  12. Reviews reports received from the Department of Education to determine impact on previous student eligibility based on changes to their Free Application for Federal Student Aid (FAFSA) and related records; communicates to students and staff regarding changes to eligibility; requests supporting documentation to resolve conflicting information and places holds on financial aid disbursements until conflicts are resolved.
  13. Identifies and analyzes strengths and improvement areas within the Student Financial Services Department; creates objectives and goals based on the improvement areas to strengthen the performance level for the office and for student success; conducts statistical analyses to measure data collected via surveys, workshops, attendance reports, student participation, and other evaluative tools to determine outcomes; prepares improvement recommendations based on these outcomes.
  14. Utilizes professional judgement in evaluating student's special circumstances on a case-by-case basis, using documentation provided in conformity with federal regulations.
  15. Conducts financial aid presentations and facilitates online workshops; participates in high school and community functions and activities, including job and career fairs; develops specialized marketing materials such as flyers, banners, and posters.
  16. Manages communication management database to provide timely communications through letters and emails throughout the year.
  17. Collaborates to assist students in determination of eligibility for financial assistance; ensures accurate information is developed and disseminated correctly to students and staff; determines specific disbursement dates of grants, loans, or special programs.
  18. Participates in District-provided in-service training.
  19. Performs other related duties as assigned; specific duties not listed does not exclude them for this classification if the work is similar or related.

## **QUALIFICATIONS**

### **Knowledge of:**

1. Multiple sources of financial aid and the processes through which they are available.
2. Applicable federal, state, and local laws, rules, regulations, ordinances, and organizational policies and procedures relevant to assigned area of responsibility.
3. Eligibility criteria for a diverse range of student funding sources.
4. Purpose, intent, and guidelines of the SAP program.
5. Methods and techniques of interviewing students and eliciting relevant information.
6. Methods and techniques of evaluating student awards based on specific funding program criteria.
7. Diverse academic, socio-economic, cultural, disability, and ethnic backgrounds of community college students, staff, and the community.

8. General office and business administrative processes.
9. Mathematical principles.
10. Principles and practices of quality control.
11. Operational characteristics of multiple databases from funding agencies to ensure data is properly retrieved, entered, and submitted.
12. Methods and techniques of preparing reports and business documents.
13. Principles and practices of recordkeeping.
14. Methods and techniques of developing program information and materials.

**Ability to:**

1. Interpret and apply a wide variety of changing federal, state, and institutional policies and procedures.
2. Examine and evaluate applications and award appropriate funding to students based on specific funding criteria.
3. Administer, monitor, and maintain the SAP appeal program.
4. Interpret and apply rules and regulations from multiple funding sources including student loans and adjust funding based on same.
5. Exercise sound interviewing skills when discussing personal and sensitive issues with students.
6. Use adequate documentation in conformity with federal regulations to make appropriate adjustments to FAFSA or California Dream Act Application (CADAA) elements to override dependency or other criteria that affects students' eligibility for aid.
7. Deliver financial aid presentations to students and others in the financial aid application process.
8. Be thorough, organized, consistent, and accurate in processing diverse and complex financial aid files.
9. Prepare business documents and reports on program services and operations.
10. Serve as a liaison for financial aid programs with internal and external organizations.
11. Perform accurate mathematical calculations and computations.
12. Stay current on changing funding policies, procedures, and requirements.
13. Maintain confidentiality of information received during work.
14. Plan and organize clear and concise student records for audit and oversight purposes.
15. Exercise independent judgment within general policy and procedural guidelines.
16. Effectively use computer systems, software applications relevant to work performed, and business equipment to perform a variety of work tasks.
17. Communicate effectively in the course of performing work tasks.
18. Establish, maintain, and foster effective working relationships with those contacted in the course of work.
19. Demonstrate clear evidence of sensitivity and understanding of the diverse academic, socio-economic, disability, and ethnic backgrounds of students, staff, and the community.
20. Provide efficient, high-level customer service to the public, vendors, contractors, and District personnel.

**Education and Experience:**

An associate's degree in business, accounting, or a related field and three (3) years of increasingly responsible experience supporting a financial aid program in an educational institution; or an equivalent combination of education, training, and/or experience.

**Licenses and Certifications:**

None.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This classification primarily works in an office and standing in and walking between work areas is occasionally required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Employees in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

The essential functions of this classification must be performed by the incumbents with or without reasonable accommodations.

### **ENVIRONMENTAL CONDITIONS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset individuals in interpreting and enforcing departmental policies and procedures.