



Classification Title: Financial Aid Analyst

Department:	Financial Aid, Veterans, and Scholarship Services	EEO6 Code:	5
Employee Group:	Classified	Salary Grade:	26
Supervision Received From:	Director, Financial Aid, Veterans, and Scholarship Services	Date of Origin:	9/2016
Supervision Given:	Direction and Guidance	Last Revision:	8/2024

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed by individual positions.

JOB SUMMARY.

Analyzes and evaluates student applications and supporting documentation and determines eligibility for a variety of financial aid programs including grants, loans and scholarships in accordance with District policies and procedures and federal, state and local laws, regulations and other requirements; provides information to students, parents, faculty, staff and the public on available financial assistance opportunities; under general supervision, responsible for researching the scope and requirements of a variety of financial aid programs, scholarships and grants; maintains detailed financial and statistical records; coordinates one or more assigned programs such as the Palomar College Scholarship Program, Cal Grant program, the Dream Act/Assembly Bill (AB) 540 program, the Federal Work Study program and others.

DISTINGUISHING CHARACTERISTICS.

The Financial Aid Analyst is distinguished from Admissions/Financial Aid Specialist I/II and other classes in the Enrollment Services job family by the former's responsibility for independently performing more complex and technical financial aid assignments including making determinations on the award of financial assistance to eligible students and coordinating a variety of programs including the Palomar College Scholarship Program, William D. Ford Direct Loan Program, Cal Grant and Federal Work Study programs. Admissions/Financial Aid Specialists I/II are responsible for performing a variety of admissions, enrollment and the more routine financial aid duties at a public counter or in a back office environment.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS.

Essential Functions: Essential responsibilities and duties may include, but are not limited to, the following:

1. Reviews financial aid applications and supporting documents submitted by students; follows up to resolve discrepancies and obtain missing information; determines student eligibility under all criteria for federal, state and institutional financial assistance awards for assigned financial aid and institutional aid programs, which may include Pell Grants, Supplemental Education Grants, Federal Work Study and Student Loans and scholarships; analyzes individual student files and determines eligibility, making case-by-case professional judgment decisions to adjust analyses based on extenuating circumstances, dependency overrides and financial aid appeals; packages financial aid, scholarships, grants and other allocations; authorizes the disbursement of funds after re-verifying student eligibility and enrollment through various reports; monitors to ensure enrollment criteria are met on an ongoing basis and adjusts financial aid awards when warranted.
2. Verifies the accuracy and completeness of student financial aid application data from records selected by the federal or state processor, the District or other Financial Aid Analysts; reviews federal tax returns to identify errors or omissions

in income or asset information reported on applications; verifies the accuracy of family size and number in college reported on Free Application for Federal Student Aid (FAFSA) forms; submits corrected information to the federal processor to recalculate the student's Student Aid Index; maintains records and communicates with students.

3. Determines students' Satisfactory Academic Progress to qualify for federal aid, state and institutional aid; reviews cumulative grade point averages, pace of progression, unit limits, transferable units from other colleges and Maximum Time Frame worksheets to determine if students can complete their program majors within the maximum allowable number of units; reviews appeals to determine if there are extenuating circumstances or other documentation to override a disqualification for not meeting academic progress requirements.
4. For students who have withdrawn from enrollment, performs calculations to determine the amount of federal or state aid funds that must be returned to Title IV or State programs; performs Over Award calculations applicable to students whose enrollment status has changed, reducing their eligibility for financial aid; notifies students of overpayment amounts owed.
5. Coordinates a variety of assigned financial aid programs as directed, including but not limited to Cal Grants, California Dream Act, Chafee Grant, Federal Direct Student Loan, Federal Work Study, Return of Title IV Aid (R2T4), CVC Exchange, California College Promise Grant and Scholarships; researches and determines student eligibility based on established program criteria; performs technical, analytical, computer data entry, reporting and reconciliation activities required for administration on one or more of the financial aid programs.
6. Serves as the Financial Aid, Veterans, and Scholarship Services department liaison to students, staff, other District departments and outside organizations on matters related to assigned program responsibilities.
7. May serve as an advisor at the front counter; reviews financial aid applications for completeness and consistency of information and records comments; records intake of documents; provides information on requirements and procedures for financial aid, veterans' educational benefits and scholarships; explains District policies and procedures; responds to specialized inquiries and complaints.
8. Conducts workshops and outreach events regarding financial aid and application procedures.

Marginal Functions:

1. Attends training and workshops to stay current on financial aid program rules, regulations, policies and procedures.
2. Creates specialized spreadsheets, forms and other recordkeeping materials as needed.
3. Participates in Financial Aid, Veterans, and Scholarship Services outreach events as assigned.
4. Updates the District website regarding scholarship availabilities and application deadlines, Federal Work Study job listings and other financial aid information.
5. Provides backup at the front counter or in the back office for other Admissions/Financial Aid Specialists I/II.
6. Performs related duties and responsibilities as required.

QUALIFICATIONS.

Experience and Education/Training Guidelines: Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience: Five years of experience involving student financial aid processes.

Education/Training: Equivalent to completion of the twelfth grade.

Preferred Qualifications: College-level coursework from an accredited college or university in business administration, finance, accounting or a related field.

Knowledge of:

1. Goals and objectives of a college financial aid office.
2. Sections of the California Education Code applicable to assigned responsibilities.
3. The Family Educational Rights and Privacy Act, Title IV and other state and federal laws, rules, regulations and policies governing financial aid and applicable eligibility criteria.
4. Operations of a computer and uses of standard business applications including word processing, spreadsheet and database software and other specialized software applications such as enterprise software that are relevant to assigned areas of responsibility.
5. Basic fund accounting, and financial and statistical recordkeeping techniques.
6. Office administration practices and procedures, including filing and recordkeeping systems; advanced knowledge of computers and applicable software programs and specialized financial aid databases and systems.
7. Research methods and procedures applicable to the work.
8. Business mathematics.
9. Principles and practices of sound business communication; correct English usage, grammar, spelling and punctuation.
10. Concepts, practices and techniques of customer service.

Skill in:

1. Interpreting, explaining and applying federal and state laws, rules, regulations, policies, procedures and practices governing financial aid and scholarship programs.
2. Making determinations and applying professional judgment regarding eligibility for financial assistance based on established procedures and complex guidelines, ensuring consistency and a high degree of accuracy.
3. Organizing, setting priorities and exercising sound independent judgment in areas of responsibility.
4. Operating a computer and other standard office equipment and using spreadsheet, word processing, enterprise software and federal and state databases and systems.
5. Researching, calculating, tracking and reporting financial and statistical information utilizing complex spreadsheets and databases.
6. Maintaining sensitivity to and understanding of the diverse academic, socioeconomic, age, cultural, physical or mental disability, medical condition, gender, gender expression, gender identity, sex, sexual orientation, nationality, race and ethnic backgrounds of community college students, faculty, and staff.
7. Preparing clear, concise and accurate records, data entries, reports and other written materials.
8. Communicating clearly and effectively, both orally and in writing.
9. Maintaining the confidentiality of student records and information.
10. Using tact, discretion, courtesy and patience in dealing with sensitive and difficult students and situations.
11. Establishing and maintaining effective working relationships with others encountered in the course of work.

WORKING CONDITIONS.

Environmental Conditions: The employee works under typical office conditions with extensive exposure to computer screens and frequent contact with students, family members, staff of other departments and the public, some of whom may be upset or angry.

Physical Conditions: Essential and marginal functions may require physical fitness requirements necessary to perform the job functions with or without accommodation, such as the ability to sit or stand for prolonged periods; near visual acuity for reading computer screens, reports and schedules; repetitive use of hands for extensive use of keyboards.

TERMS OF EMPLOYMENT.

The duration of any fully restricted funded position in this classification is dependent upon the continuation of funding. Must be able to obtain and maintain security clearances required to access state and federal databases used for financial aid.