



Classification Title: Lead Academic Records Analyst

Department:	Evaluations and Records	EEO6 Code:	5
Employee Group:	Classified	Salary Grade:	27
Supervision Received From:	Manager, Admissions, Records & Evaluations	Date of Origin:	9/2016
Supervision Given:	Direction and Guidance	Last Revision:	9/2016

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.

Provides lead guidance and training to other Evaluations and Records staff; participates in the preparation and integration of software modules and updates pertinent to the Evaluations and Records unit; performs the full range of academic evaluation and records duties; serves as a technical resource in making determinations on the more complex records evaluation cases.

DISTINGUISHING CHARACTERISTICS.

The Lead Academic Records Analyst is distinguished from Academic Records Analyst by the former's responsibility for serving as a lead and information resource to other Evaluation and Records staff in addition to performing the full range of records and evaluation duties, as well as participating in the integration of new and updated software modules pertinent to the unit.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS.

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

1. Participates in training and providing day-to-day lead work direction to other Evaluation and Records staff, short-term employees and student workers; assigns work and ensures completeness, accuracy and conformance with District, department and legal/regulatory requirements and standards; monitors work flow to assist in ensuring that mandated deadlines are being met in an optimal manner; provides information, guidance and training on work procedures and technical/legal/regulatory requirements; assists in maintaining a fair and open work environment in accordance with the District's commitment to teamwork, mutual trust and respect.
2. Plays a lead role in the strategic preparation and integration of software modules and updates, such as PeopleSoft transfer credit and academic advising (degree audit) and OnBase imaging and workflow; maintains academic records databases and related database fields pertaining to unit processes such as transfer credit, academic advising and workflow; conducts workflow and data integrity tests to ensure accuracy and utilization of analyzed and encoded work and processes; develops and provides documentation and training for unit processes such as transfer credit, academic advising and workflow.
3. Collaborates with other District student services including admissions, financial aid, veterans' services, articulation, assessment and counseling to maintain efficient document and data management of transcripts and other academic records utilizing imaging and workflow processes.

4. Evaluates incoming academic transcripts and records to determine equivalency, degree or program completion and transferability of course credits; analyzes course descriptions and syllabi for content, level, unit value and grading system using online curriculum resources, college catalogs, class schedules and other reference materials; follows up with other institutions to resolve questions and issues; verifies institutions' accreditation status; converts quarter units to semester units; applies course repetition and limitation policies where applicable; identifies, recommends and initiates potential degree and prerequisite substitutions for faculty review; posts student transfer equivalences and prerequisite clearances in the transfer credit database.
5. Documents evaluation decisions and recommendations; provides explanations of complex rules and regulations to students in the event of denial of credit transfers; advises students of any options available to them, including grade adjustments, academic renewal, course substitutions and changes in major; discusses issues with the relevant department chairs/directors.
6. Evaluates student academic records to determine student advanced standing following established procedures and in consultation with the Articulation Officer and department chairs/directors; makes determinations on completion of Palomar College graduation and University of California/California State University transfer requirements; validates units and grades for other purposes including veteran benefits, active duty evaluations and financial aid student academic progress requirements.
7. Prepares, updates and maintains graduation lists; updates records of student academic standing including removing dismissal holds; authorizes and processes course repetition petitions.
8. Maintains a permanent record of transactions regarding academic records for verification and audit; responds to inquiries and provides information to students, staff, faculty, administrators, other institutions and the public on regulations, policies, procedures and guidelines.
9. Maintains a file of academic procedure changes and decisions affecting academic records evaluations and graduation.
10. Stays abreast of updates in District policies and procedures, general education and transfer credit policies, curriculum and articulation updates and current and emerging technologies.

Marginal Functions:

1. Serves as a resource and provides technical information to faculty, counselors, staff, administrators and other institutions.
2. Prepares a variety of general correspondence regarding course information, curriculum issues, verification of degrees and other issues.
3. 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: Four years of progressively responsible experience performing academic evaluation and records duties.

Education/Training: Equivalent to an associate's degree from an accredited college or university with coursework in education, recordkeeping, statistics, business administration or a related field.

Preferred Qualifications:

Lead experience, records/data analysis, documentation, interpretation/application of regulations or related experience.

Knowledge of:

1. Operations, services and activities of an academic records and evaluation program.
2. Methods, techniques and sources of information used in the analysis and evaluation of student academic records and transcripts.
3. Standards, requirements, practices, techniques and terminology involved in academic structures, transfer of credit and curriculum interpretation in post-secondary educational institutions.
4. College curriculum interpretation and application as related to transfer of credit and degree and certificate requirements.
5. Sections of the California Education Code applicable to assigned responsibilities.
6. The Family Educational Rights and Privacy Act (FERPA) and other state and federal laws, rules, regulations and policies governing student admissions, matriculation and articulation.
7. Methods of collecting and organizing data and information and report preparation techniques.
8. Operations of a computer and uses of standard business applications including word processing, spreadsheet and database software and other specialized software applications relevant to assigned areas of responsibility such as enterprise software and imaging systems.
9. Office administration practices and procedures, including filing and recordkeeping systems.
10. Research methods and procedures applicable to academic records.
11. Business mathematics.
12. Principles and practices of sound business communication; correct English usage, grammar, spelling and punctuation.
13. Concepts, practices and techniques of customer service.

Skill in:

1. Assigning and inspecting the work of lower-level staff.
2. Interpreting, explaining and applying complex legal mandates, regulations, guidelines, policies and procedures applicable to assigned responsibilities with consistency and a high degree of accuracy.
3. Identifying issues, evaluating alternatives and reaching sound decisions within areas of assigned responsibility.
4. Organizing complex information from a variety of sources and in a variety of formats and writing concise summaries, reports and documentation.
5. Developing and maintaining cooperative and effective workflow processes with a variety of other individuals and organizations.
6. Making arithmetic calculations quickly and accurately.
7. Operating at an advanced level computer, enterprise software, word processing and spreadsheet software and other standard business equipment including imaging systems.
8. Maintaining sensitivity to and understanding of the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds of community college students, faculty, and staff.
9. Preparing clear, concise and accurate records, data entries, reports and other written materials.
10. Communicating clearly and effectively, both orally and in writing.
11. Maintaining the confidentiality of department and student records and information.

12. Using tact, discretion, courtesy and patience in dealing with sensitive and difficult students and situations.
13. 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 faculty, 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 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.