

## Job Template: Financial Aid Analyst

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Analyst</b>
<b>Job Category: P</b>	<b>Job Level: 2</b>
<b>FLSA Status: E</b>	<b>Job Code: L20000</b>

### **P2: Level Standards**

#### **GENERAL ROLE**

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Tend to have assignments that are reoccurring and work outputs generally are delivered in a prescribed form/format.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- May recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

#### **INDEPENDENCE AND DECISION-MAKING**

→ *Supervision Received*

- Works under general supervision.
- Periodic checks on accuracy, quality, and timeliness of outcomes.

→ *Context of Decisions*

- Independently develops how work is to be done based on precedent, practice, and existing policy at the unit/office levels.

→ *Job Controls*

- Possess the latitude to adjust the work processes or methods to effectively and efficiently manage their work assignments.
- Guided by general procedures and professional norms.

## **Job Template: Financial Aid Analyst**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Analyst</b>
<b>Job Category: P</b>	<b>Job Level: 2</b>
<b>FLSA Status: E</b>	<b>Job Code: L20000</b>

### **COMPLEXITY AND PROBLEM SOLVING**

→ *Range of issues*

- Problems tend to be modestly technical or operational.

→ *Course of Resolution*

- Performs comparisons, verifications, reconciliations, compilations, etc. and such of data, program or student services/practices, or operational/staff output.
- Understands the end product/outcome and where to send and receive information and materials to fulfill the assigned responsibilities.

→ *Measure of Creativity*

- Once problems are identified, solutions generally can be resolved using conventional or standard procedures.
- Most of the obstacles, issues, or concerns can be handled with established practice and policy.

### **COMMUNICATION EXPECTATIONS**

→ *Manner of Delivery and Content*

- Regularly provides information on finished materials to others.

### **SCOPE AND MEASURABLE EFFECT**

- Actions typically affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents indirectly promote the general welfare of students, faculty and staff, and safeguard the institution by playing an important role within a process.

## Job Template: Financial Aid Analyst

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Analyst</b>
<b>Job Category: P</b>	<b>Job Level: 2</b>
<b>FLSA Status: E</b>	<b>Job Code: L20000</b>

### Job Template

#### GENERAL SUMMARY

Analyzes and packages student financial aid awards in accordance applicable regulations, statues, and policies.

#### REPORTING RELATIONSHIPS AND TEAMWORK

Works under general supervision of a supervisor or manager.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

- Reviews financial aid applications and analyzes financial situations/needs. Determines appropriate packaging of aid based on standardized procedures. Sends for documentation and additional information as needed.
- Stays abreast of all federal and state rules, regulations, and guidelines governing various types of financial aid.
- Makes adjustments for over-awards by determining amount of aid to be cancelled or repaid, ensuring accuracy of figures, contacting students regarding possible alternatives, and notifying appropriate University offices of adjustments.
- Logs incoming mail, correspondence, and forms to student files. Processes forms and correspondence requiring additional action.
- Posts tuition waivers, private scholarships, and fellowships. Corresponds with academic departments as questions arise.
- Assists with special awarding projects. Evaluates eligibility for additional aid.
- Communicates with students, families, and other external constituents in regards to verification completion, additional documentation requests, etc.
- Performs related work as required.

#### MINIMUM QUALIFICATIONS

- Bachelor's degree in related field.
- Two years of related experience.

## **Job Template: Financial Aid Analyst**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Analyst</b>
<b>Job Category: P</b>	<b>Job Level: 2</b>
<b>FLSA Status: E</b>	<b>Job Code: L20000</b>

### **COMPETENCIES**

#### **Knowledge of:**

- Federal and state regulations that govern the administration of financial aid programs
- Financial aid processes
- Microsoft Office and related software applications

#### **Skill in:**

- Data entry
- Planning and organization
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

#### **Ability to:**

- Follow established procedures
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Troubleshoot error or issues for resolution
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management

## Job Template: Financial Aid Officer

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Officer</b>
<b>Job Category: P</b>	<b>Job Level: 3</b>
<b>FLSA Status: E</b>	<b>Job Code: L20001</b>

### **P3: Level Standards**

#### **GENERAL ROLE**

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

#### **INDEPENDENCE AND DECISION-MAKING**

→ *Supervision Received*

- Works under limited supervision.

→ *Context of Decisions*

- Utilizes general departmental guidelines to develop resolutions outside the standard practice.

→ *Job Controls*

- Possesses considerable freedom from technical and administrative oversight while the work is in progress.
- Defines standard work tasks within departmental policies, practices, and procedures to achieve outcomes.
- Serves as the advanced resource to whom more junior employees go to for technical guidance.

## **Job Template: Financial Aid Officer**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Officer</b>
<b>Job Category: P</b>	<b>Job Level: 3</b>
<b>FLSA Status: E</b>	<b>Job Code: L20001</b>

### **COMPLEXITY AND PROBLEM SOLVING**

#### *→ Range of issues*

- Handles a variety of work situations that are cyclical in character, with occasionally complex situations.
- Issues are regularly varied.
- Problems tend to be technical or programmatic in nature.

#### *→ Course of Resolution*

- Assesses a variety of situations, and develops resolutions through choosing among options based on past practice or experience.

#### *→ Measure of Creativity*

- Issues are solvable through deep technical know-how and imaginative workarounds.
- Most of the obstacles, issues, or concerns encountered require considering alternative practice or policy interpretation.

### **COMMUNICATION EXPECTATIONS**

#### *→ Manner of Delivery and Content*

- Regularly provides information on finished materials to others.

### **SCOPE AND MEASURABLE EFFECT**

- Actions regularly affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents have an indirect impact on a larger action or process, such as serving as a single component in an approval process, where the process is “owned” by a different work unit.
- May be designated to guide or organize the work of several employees within the unit.

## **Job Template: Financial Aid Officer**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Officer</b>
<b>Job Category: P</b>	<b>Job Level: 3</b>
<b>FLSA Status: E</b>	<b>Job Code: L20001</b>

### **Job Template**

#### **GENERAL SUMMARY**

Provides analysis of financial aid packages. Counsels students and parents and serves as an resource to students, parents, and the public. Oversees one or more of the major specialized areas of financial aid.

#### **REPORTING RELATIONSHIPS AND TEAMWORK**

Works under limited supervision of a supervisor or manager.

#### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

- Counsels students and parents regarding financial aid application process, sources, and availability of aid, regulations, and other issues pertaining to financial aid.
- Determines financial need and evaluates supporting documentation such as income tax returns, social security statements, divorce documents, unemployment and welfare documents, and tax assessments.
- Assists with the interpretation of and compliance with Financial Aid regulations governing respective program, formulation of policy guidelines, and procedures.
- Stays abreast of federal and state rules, regulations, statutes, and mandates governing various types of financial aid.
- Makes policy change recommendations and implements revisions to procedures.
- Serves as financial aid representative for outreach events.
- Awards and adjusts financial aid packages, as needed.
- Lead student employees and staff as assigned.
- Performs related work as required.

#### **MINIMUM QUALIFICATIONS**

- Bachelor's degree in related field.
- Three to four years of related experience.

## Job Template: Financial Aid Officer

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Officer</b>
<b>Job Category: P</b>	<b>Job Level: 3</b>
<b>FLSA Status: E</b>	<b>Job Code: L20001</b>

### COMPETENCIES

#### Knowledge of:

- Federal and state regulations that govern the administration of financial aid programs
- Financial aid processes
- Microsoft Office and related software applications

#### Skill in:

- Planning and organization
- Conducting research
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

#### Ability to:

- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Conduct financial aid presentations
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management



## Job Template: Financial Aid Manager

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Manager</b>
<b>Job Category: M</b>	<b>Job Level: 5</b>
<b>FLSA Status: E</b>	<b>Job Code: L20002</b>

### **M5: Level Standards**

#### **GENERAL ROLE**

This level is the first with the primary function of managing employees. Incumbents may initiate and communicate a variety of staffing actions.

Oversees the day-to-day operations of a group of employees. Responsible for training and development of subordinate staff, estimating staffing needs, assigning work, meeting completion dates, and interpreting and ensuring consistent application of organizational policies. Positions at this level do not exclusively serve as the supervisory level to only student employees.

Incumbents:

- Alter the order in which work or a procedure is performed.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure.
- Distribute work and monitor workload among staff.

#### **INDEPENDENCE AND DECISION-MAKING**

→ *Supervision Received*

- Works under direction.
- Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

→ *Context of Decisions*

- Decisions are driven by office/departmental policy and procedures.

→ *Job Controls*

- Free to plan and carry out all phases of work assignments, including the oversight of staff.
- Has the latitude to make daily operational decisions.

#### **COMPLEXITY AND PROBLEM SOLVING**

→ *Range of issues*

- Issues tend to be operational in nature.

## Job Template: Financial Aid Manager

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Manager</b>
<b>Job Category: M</b>	<b>Job Level: 5</b>
<b>FLSA Status: E</b>	<b>Job Code: L20002</b>

### → *Course of Resolution*

- Identifies issues and gathers facts.  
Understands the smallest details of an assigned area.

### → *Measure of Creativity*

- Problems can be resolved within provided guidelines.
- Problems are not amenable to strict technical resolution, requiring innovative thinking.

## COMMUNICATION EXPECTATIONS

### → *Manner of Delivery and Content*

- Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

## SCOPE AND MEASURABLE EFFECT

Incumbents:

- Manage a small homogenous department.  
OR
- Manage a larger process-oriented area whose members perform like activities.
  - Actions regularly affect a department or a project outcome with office/programmatic impact.
  - Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
  - Performance results tend to relate to efficiency, fiscal practices and standing, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

## **Job Template: Financial Aid Manager**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Manager</b>
<b>Job Category: M</b>	<b>Job Level: 5</b>
<b>FLSA Status: E</b>	<b>Job Code: L20002</b>

### **Job Template**

#### **GENERAL SUMMARY**

Administers the financial aid services for a campus or school of the University.

#### **REPORTING RELATIONSHIPS AND TEAMWORK**

Works under direction of a manager. Manages the day-to-day operations and a group of employees.

#### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

- Supervises the work of assigned personnel, including providing support, guidance, and feedback related to job duties and performance.
- Prepares, manages, and responds to auditor requests related to institutional, state, and federal compliance audits.
- Plans, develops, evaluates, interprets, and enforces policies, procedures, goals, and objectives for the program and operation in assigned area of responsibility.
- Ensures completion of accurate and timely federal, national, university, and state reports and surveys. Conducts quality assurance review of all reports, surveys, and responses to data requests.
- Oversees financial aid budget development, analysis, expenditure monitoring, and reporting.
- Develops and implements strategies related to financial aid awarding in an effort to meet University targets for enrollment, retention, and graduation.
- Serves as primary point person to evaluate, interpret, and implement policies and procedures in compliance with federal regulations.
- Assist with overall administration of the department.
- Creates and conducts training workshops for staff.
- Performs related work as required.

#### **MINIMUM QUALIFICATIONS**

- Bachelor's degree in related field.

## **Job Template: Financial Aid Manager**

<b>Occupational Group</b>	Student Programs/Services
<b>Job Family</b>	Financial Aid and Student Employment
<b>Job Path</b>	Financial Aid
<b>Job Title</b>	<b>Financial Aid Manager</b>
<b>Job Category: M</b>	<b>Job Level: 5</b>
<b>FLSA Status: E</b>	<b>Job Code: L20002</b>

- Five to six years of related experience.

### **COMPETENCIES**

#### **Knowledge of:**

- Federal and state financial aid regulations
- Student information systems
- Principles and practices of employee supervision
- Current news and trends in higher education
- Microsoft Office and related software applications

#### **Skill in:**

- Planning and organization
- Collaboration
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving, and analysis

#### **Ability to:**

- Review and analyze data to identify trends and initial improvements
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Assemble and organize data and prepare reports
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management