



## University Information

**Org/College:** Office of the Provost

**Department:** [Office of Student Financial Aid](#)

**UI Job Code:** PCF1

**Pay Level:** 3A

**Job Function:** Academic Support

**Job Family:** [Financial Aid Services](#)

**University Classification:** Financial Aid Counselor

## Department Information

**Org/Dept/Sub-dept #:** 02-4666

**Position #:** 00245202

**Working Title (if applicable):** **Withdrawal and Satisfactory Academic Progress (SAP) Coordinator**

**This Position Reports to (Title/Position #):** **Nicholas Zika, Associate Director, Processing & Verification**

**Position Has Administrative Supervision?**  No  Yes

## Position Information

**Position Overview:** Reporting to the Associate Director of Processing and Verification, this position is responsible for assisting the Associate Director of Processing and Verification, and the Senior Associate Director of Advising and Office Operations, with the hands-on management of various attendance and academic issues impacting Title IV aid eligibility. This position will manage and process Satisfactory Academic Progress (SAP) appeals, withdrawals and unofficial withdrawals, R2T4 calculations and tracking, monitoring non-attendance reports and adjusting aid, among other financial aid eligibility processes impacted by attendance and academics. This position will assist with cost of attendance development and implementation. This position requires critical analysis, interpretation, and understanding of federal, state, and institutional financial aid regulations and policies with an ability to contribute to policy and procedure development. This position requires, at minimum, a proficiency level in these areas to work with the Associate Directors in assuring compliance with Title IV federal regulations.

**Salary:** \$42,500 to commensurate

**Campus Location:** UCC

**Work Modality:** Hybrid

**Percent Time:** 100%

## What You Do: (Key Areas of Responsibility)

**Evaluate and Analyze Application Information/Reviews Standards and Regulations; Awards Financial Aid Award/Package (Both Need-and Merit-Based) (PCF1):** *Review data and make routine decisions based on established criteria. May be responsible for recommendations that may override established criteria based on expert knowledge. Communicate information regarding*

- Review Satisfactory Academic Progress (SAP) appeals and reinstate, or award financial aid based on approved appeals. Evaluate SAP eligibility and award new financial aid applicants.
- Review financial aid offers for accuracy based on attendance, required and/or appropriate sources of documentation, and resolve conflicting information. Revise financial aid as needed based on federal financial aid policies and procedures.
- Assist with processing various forms including change in income, cost of attendance change, and other professional judgement documents.
- Track consortium agreements for students studying at other institutions/programs requiring unique cost of attendance adjustments in relation to attendance issues. Additional adjustments made based on

<p><i>implementation to current staff. Communicate defined standards and regulations.</i></p>	<p>changes in enrollment hours and costs, additional financial aid received, or at the request of the student.</p> <ul style="list-style-type: none"> <li>• Other duties as assigned necessary for the evaluation, awarding, processing and adjusting of student aid programs.</li> </ul>
<p><b>One-on-One Consultation and/or Outreach Services (PCF1):</b> <i>Provide information to current and prospective students and their families regarding financial aid policies, procedures, application processes and financial aid options. Develop training materials related to the awarding process. Instruct, educate and interact with students, parents, general public and UI departments regarding application policies and procedures, types of financial aid, and disbursement of funds. Define framework for routine and non-routine communication.</i></p>	<ul style="list-style-type: none"> <li>• Collaborate with campus partners, in person, meetings, via email, and by phone regarding financial aid policies, procedures, application processes, and federal, state, and institutional aid programs related to attendance.</li> <li>• Utilize effective counseling skills for highly charged emotional situations.</li> <li>• Communicate with students, faculty and staff who contact the Office of Student Financial Aid through designated email inboxes</li> <li>• Utilize problem-solving skills to assist students experiencing financial difficulties to develop plans encouraging retention and on-time graduation.</li> <li>• Serve on varied internal and external committees, and special projects as assigned by administrators.</li> <li>• Other duties as assigned necessary for providing exemplar customer service to our students and their families.</li> </ul>
<p><b>Data Collection, Analysis and Reporting (PCF1):</b> <i>Gather data.</i></p>	<ul style="list-style-type: none"> <li>• Compile raw student data for each attendance category for audits, metrics, reports, end of semester analysis etc.</li> <li>• Assist in the review and tracking of students on SAP and students appealing for financial aid eligibility who are not meeting SAP requirements.</li> <li>• Responsible for Return of Title IV Funds calculations processed through the Common Origination and Disbursement system (COD) and aid adjustments for both official and unofficial withdrawals, non-attendance, census, and other issues related to attendance.</li> <li>• Monitor and research changes in federal regulations to update internal manuals ensuring compliance with Title IV aid regulations and US Department of Education guidelines.</li> <li>• Monitor trends and demographic information of students who withdraw from the university.</li> <li>• Assist in data analysis related to student financial concerns.</li> </ul>
<p><b>Budget Oversight and Management (PCF1):</b> <i>Advise management on budgetary needs or discrepancies.</i></p>	<ul style="list-style-type: none"> <li>• Serve on internal and external committees, and special projects assigned by administrators. Committee service within the office includes the Cost of Attendance committee that researches and determines student budgets for financial aid packages, and the Professional Judgment Committee that reviews and makes determinations with regard to special circumstances presented by students and parents.</li> </ul>

**Universal Competencies**

<p><b>Collaboration/Positive Impact:</b> <i>Ability to work with a variety of individuals and groups in a constructive and civil manner and utilize existing resources and learning to achieve or exceed desired outcomes of current and future organizational goals/needs.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>• Shares appropriate information/feedback openly, professionally and respectfully.</li> <li>• Models open, respectful, accepting, and supportive behaviors with team members.</li> <li>• Maintains productive work relationships while considering multiple perspectives and using effective conflict resolution practices.</li> <li>• Aligns expectations for self and team to achieve work objectives and overcome obstacles.</li> </ul>
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<p><b>Service Excellence/Customer Focus:</b>  <i>Ability to meet or exceed customer service needs and expectations and provide excellent service in a direct or indirect manner. Ability to effectively transmit and interpret information through appropriate communication with internal and external customers.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>• Enhances service by seeking ways to add value to customer interactions/services.</li> <li>• Demonstrates sincere concern and takes responsibility when a customer complaint, even if the cause of the problem lies elsewhere.</li> <li>• Listens to feedback without defensiveness and uses it to enhance communication effectiveness.</li> <li>• Communicates in alternative ways to accommodate different listeners.</li> </ul>
<p><b>Welcoming and Respectful Environment:</b>  <i>Ability to foster a welcoming and respectful workplace environment while recognizing personal differences. Ability to work with a variety of individuals and groups in a constructive and respectful manner while appreciating the importance of a workforce that benefits from the talents of all people across multiple characteristics, including: race, creed, color, religion, national origin, age, sex, pregnancy (including childbirth and related conditions), disability, genetic information, status as a U.S. veteran, service in the U.S. military, sexual orientation, gender identity, or associational preferences.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>• Maintains productive work relationships while considering multiple perspectives.</li> <li>• Resolves cross-cultural conflicts effectively.</li> <li>• Understands and describes the unit’s commitment to creating a workplace environment where people of all backgrounds and perspectives feel welcomed and appreciated, and the reasons for its importance.</li> <li>• Contributes to a welcoming and respectful workplace environment as described above.</li> </ul>
<p>Staff members are expected to meet reasonable standards of work quality and quantity, as well as expectations for attendance established by their supervisor. Staff members are also expected to comply with policies governing employee responsibilities and conduct, including those contained in the <u><a href="#">University Operations Manual</a></u></p>	
<p><b>How You Do Your Job:</b> (learn about competencies and proficiency levels <u><a href="#">here</a></u>)</p>	
<p><b>Accuracy and Attention to Detail:</b>  <i>Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>• Processes detailed information with good accuracy.</li> <li>• Utilizes specific approaches and tools for checking and cross-checking outputs.</li> <li>• Develops and uses checklists to ensure that information goes out error-free.</li> <li>• Accurately gauges the impact and cost of errors, omissions, and oversights.</li> <li>• Learns from mistakes and applies lessons learned.</li> </ul>
<p><b>Data Gathering and Analysis:</b>  <i>Knowledge of data gathering and analysis tools, techniques and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>• Participates in gathering and analyzing data for a project or projects.</li> <li>• Utilizes the basic data collection and evaluation tools and techniques.</li> <li>• Follows proper data gathering and analysis processes and policies.</li> <li>• Reports problems that arise in the data collection process.</li> <li>• Reviews the results to ensure the quality and accuracy of data gathering and analysis.</li> </ul>

<p><b>Decision Making and Critical Thinking:</b>  <i>Understanding of the issues related to the decision-making process; ability to analyze situations fully and accurately and reach productive decisions.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> <li>Assists in assessing risks, benefits and consideration of alternatives.</li> <li>Participates in documenting data, ideas, players, stakeholders, and processes.</li> <li>Applies an assigned technique for critical thinking in a decision-making process.</li> <li>Recognizes, clarifies, and prioritizes concerns.</li> <li>Identifies, obtains, and organizes relevant data and ideas.</li> </ul>
<p><b>Financial Aid Programs and Policies:</b>  <i>Knowledge of and the ability to develop and implement financial aid programs and policies to attract outstanding students and help them finance their course of study.</i></p>	<p>Proficiency Level: BASIC</p> <ul style="list-style-type: none"> <li>List types of major financial aid for undergraduate and post-graduate students.</li> <li>Identifies current institutional policies related to financial aid.</li> <li>Explains the application procedures for each type of financial aid program.</li> <li>Describes the laws and regulations related to financial aid in federal, state, or commercial loans.</li> </ul>
<p><b>Resource Management:</b>  <i>Plans, mobilizes and distributes resources to fulfill business objectives and plans.</i></p>	<p>Proficiency Level: BASIC</p> <ul style="list-style-type: none"> <li>Identifies the key resources at hand to fulfill own responsibilities.</li> <li>Demonstrates the ability to apportion resources to different components of a task.</li> <li>Applies the concept of sustainability to conserve and reuse resources where possible.</li> <li>Seeks help to obtain additional resources when necessary.</li> </ul>
<p><b>Effective Communications:</b>  <i>Understanding of effective communication concepts, tools and techniques; ability to effectively transmit, receive, and accurately interpret ideas, information, and needs through the application of appropriate communication behaviors.</i></p>	<p>Proficiency Level: Working</p> <ul style="list-style-type: none"> <li>Makes oral presentations and writes reports needed for own work.</li> <li>Avoids technical jargon when inappropriate.</li> <li>Looks for and considers non-verbal cues from individuals and groups.</li> <li>Listens to feedback without defensiveness and uses it for own communication effectiveness.</li> <li>Delivers helpful feedback that focuses on behaviors without offending the recipient.</li> </ul>
<p><b>Financial Analysis:</b> <i>Knowledge of and ability to read, interpret and draw accurate conclusions from financial and numerical material.</i></p>	<p>Proficiency Level: Working</p> <ul style="list-style-type: none"> <li>Works with a specific financial analysis tool set.</li> <li>Utilizes basic qualitative and quantitative tools and techniques with proficiency.</li> <li>Implements valid financial analysis aligned with key criteria.</li> <li>Interprets major types of financial statements issued by the organization.</li> <li>Applies principles used to evaluate the economics of investment decisions.</li> </ul>
<p><b>Interpersonal Relationships:</b>  <i>Plans, mobilizes and distributes resources to fulfill business objectives and plans.</i></p>	<p>Proficiency Level: Working</p> <ul style="list-style-type: none"> <li>Collaborates with departmental associates and management.</li> <li>Adapts interaction style to situations and people.</li> <li>Identifies roles and responsibilities for self and others.</li> <li>Demonstrates an understanding of alternative points of view.</li> <li>Explains impact of interactions with individuals and groups.</li> </ul>

**Position Qualifications:** *(for recruiting purposes only, fill when replacing position)*

<b>Education (or equivalency) Required</b>	<ul style="list-style-type: none"> <li>• Bachelor's degree or an equivalent combination of education and experience is required.</li> </ul>
<b>Experience Required</b>	<ul style="list-style-type: none"> <li>• Experience working in a post-secondary academic setting or in another sector dealing with detail-oriented projects, counseling, and/or education, typically six months to one year at minimum.</li> <li>• Experience working with financial aid policies and procedures, typically six months to one year at minimum.</li> </ul>
<b>Competencies Required</b>	<p>Demonstrates a proficiency level in:</p> <ul style="list-style-type: none"> <li>• The ability to think critically and provide input and sound interpretations.</li> <li>• The ability to apply knowledge and decision-making skills to individual situations.</li> <li>• Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.</li> <li>• Knowledge of data gathering and analysis tools, techniques, and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.</li> <li>• The ability to work developmentally with students; ability to promote student learning development and success by applying advising approaches to diverse individual student situations.</li> <li>• The knowledge, and application of the communication techniques and relationship building skills that develop the ability to work with a variety of individuals and groups in a constructive and collaborative manner.</li> <li>• Microsoft Excel, Word, and Outlook.</li> </ul>
<b>Special Qualifications Required</b>	<ul style="list-style-type: none"> <li>• Potential travel requirements for professional development or conference opportunities</li> <li>• Occasional evening or weekend work required</li> </ul>
<b>Desirable Qualifications</b>	<p>Demonstrates a BASIC/WORKING/EXTENSIVE/EXPERT proficiency level in:</p> <ul style="list-style-type: none"> <li>• An earned Master's degree</li> <li>• Basic knowledge of University of Iowa policies, procedures, and regulations.</li> <li>• Previous R2T4 and/or SAP Experience</li> <li>• Earned NASFAA Return of Title IV Credential</li> <li>• Earned NASFAA Satisfactory Academic Progress Credential</li> </ul>