

## Job Description



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<b>Job Title:</b>	Financial Aid Specialist
<b>Department:</b>	Registrar's Office
<b>Reports To:</b>	Assistant Director, Student Awards and Financial Aid
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 6
<b>Effective Date:</b>	March 2022

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### **Primary Purpose**

The Financial Aid Specialist position is responsible for the administration of financial need programs, primarily the Ontario Student Assistance Program (OSAP) and other provincial/territorial equivalent programs. Accountabilities include receiving, editing, auditing and determining eligibility for applicants of these programs and applying careful judgement to appeal processing decisions.

The Financial Aid Specialists work collaboratively as a team to provide proactive, student focused services in a variety of formats (i.e. in person, telephone, email, Skype for Business). The Financial Aid Specialists are a source of knowledge in the Student Awards and Financial Aid office and The Student Service Centre related to Federal and Provincial financial aid administration and all Student Award and Financial Aid (SAFA) financial aid opportunities.

### **Key Accountabilities**

#### **Policy interpretation**

- Ability to interpret Ministry policies and apply to OSAP applications to ensure compliance
- Authorize the amount of all refunds that may be returned to the student.
- Evaluate complex OSAP appeals and make approval decisions using Ministry policy.
- Provides analysis of new policy and legislation to students.
- Develops and maintains out of province procedures and user documentation within assigned portfolio.
- Ability to understand complex financial aid assessments by using the most current policy available from the Ministry of Colleges and Universities (MCU).
- Responsible to keep up to date on changes to policy and understanding the impact these changes have on the programs administered, including OSAP.

#### **Communication & Stakeholder Focus:**

- Advocate for students as needed by consulting with the MCU, National Student Loan Service Centre (NSLSC) and other organizations.
- Seeks to make recommendations to resolve challenges, sharing and documenting resolutions ensuring knowledge is shared with team
- Tailors communication (e.g. content style or medium) to diverse audiences
- Provide tier 2 support to the Student Service Centre on the front counter and phones
- Help with ongoing training needs of the Student Service Centre staff on Financial Aid information to ensure their knowledge base is strong and up to date
- Receives and responds to phone, written, in person, and electronic inquiries regarding a variety of financial aid solutions

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- Advises student(s) with unique/complex financial or family situations and recommends financial aid options as appropriate
- Communicates with NSLSC and MCU on behalf of individual students seeking third party assistance
- Keep students up to date on the progress of more complex appeals and inquiries
- Anticipates upcoming needs and concerns and looks for ways to add value beyond immediate request
- Upholds confidentiality and privacy of student information, inquiries and cases as per university policies

### **Administration of Funding**

- Administer funding for all provinces and territories, requiring sound understanding of Federal, Provincial and Territory policy and procedures.
- Administers OSAP funding by reviewing, editing, and performing an audit of applications.
- The Financial Aid Specialist provides advice and guidance to students seeking information and support
- Reviews documents for completeness and accuracy and ensures they meet requirements for approval and process
- Keeps accurate records, ensuring forms are organized and confidential documents are retained FIPPA standards
- Process and reconciles against reports throughout each term to ensure all funding applications (OSAP and other provinces) are up to date and accurate
- Run standard queries to gather data from the Student Information System (PeopleSoft) to process out of province funding records
- Extract student online application submissions for processing.
- Process international financial aid programs including Sallie Mae and US Veterans Affairs

### **Priority Setting**

- Prioritizes requests and work to address most pressing concerns first.
- Plan and organize workload within assigned portfolio
- Open to change and quick to adapt for changes out of one's control (e.g. government policies and procedures)
- Monitors quality and timeliness of own work
- Uses available resources in daily work

### **Team Support**

- Provides support and input to the Assistant Director for staff and student (work-study and work placement), hiring and student appraisals, Aids in peer training.
- Provide content for weekly team meeting
- Suggests resolution to solve moderately complex problems
- Shares priorities, workloads and back up plans
- Provide leadership and support to coop and work study students each term

*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

### Required Qualifications

<b>Education</b> <ul style="list-style-type: none"><li>• Post-Secondary degree or diploma required or equivalent education and/or experience</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• Extensive experience in a professional customer service environment</li><li>• Experience interpreting, handling and communicating financial information</li><li>• Experience working in an administrative or post-secondary environment governed by policies and procedures</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Intermediate Microsoft Word and Excel</li><li>• Experience using on-line Student Information System an asset</li><li>• Excellent data entry skills and proven aptitude for attention to detail and accuracy is required</li><li>• Excellent human relations / interpersonal, organizational, problem solving and communication (oral and written) skills required</li><li>• Demonstrating ability to handle confidential information with discretion</li><li>• Strong organization skills and demonstrated initiative with the ability to handle multiple tasks, meet deadlines, and excel in a fast-paced environment with changing priorities.</li><li>• Proven ability to work independently and as a team member in a busy deadline oriented and varied environment with changing priorities</li><li>• Knowledge of University policies and procedures relating to student records preferred</li><li>• Able to articulate concepts and content effectively in writing</li><li>• Demonstrated analytical and problem-solving skills.</li><li>• Proven aptitude to deal with difficult or sensitive situations with tact and diplomacy</li></ul>

### Nature and Scope

- **Contacts:** Internally, this position works closely with other Financial Aid Specialist, and staff from the Registrar's Office, The Student Service Centre, and Student Financial Services. Externally, this position makes contact with partner organizations such as the National Student Loan Service Centre, The Ministry of Colleges and Universities, Ontario Association of Student Financial Aid Administrators, and other institutions.
- **Level of Responsibility:** This position has defined duties and responsibilities as well as specialized work and receives direct supervision. The job may include responsibility for oversight of casual or temporary staff. The incumbent is responsible for prioritizing workload with minimal supervision in order to meet deadlines. They are accountable for the accurate processing and disbursement of government funding. The incumbent has no direct reports but participates in the onboarding, coaching, and training of casual and temporary staff and Student Service Centre staff. They provide specialized knowledge and guidance to the Student Service Centre staff.
- **Decision-Making Authority:** Makes decisions by weighing several facts including policies, procedures, guidelines and sound judgement. Additional investigation and policy interpretation is often needed for applications that are more complex when reviewing appeals and troubleshooting assessment and eligibility inquiries requiring a thorough understanding of policy and procedures.
- **Physical and Sensory Demands:** Minimal demands typical of a position operating within an office environment; periods of extensive sitting and concentrated use of visual senses.
- **Working Environment:**
- This role works in an office environment, with minimal psychological risk resulting from unavoidable exposure to hazardous, disagreeable, or uncomfortable environmental conditions. This role may

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involve exposure to emotionally challenging experiences and/or interactions with people who are upset. There may be lack of control over work pace or work process (e.g. working with a system with limited functionality to meet process needs) and constant interruptions (e.g. student inquiries, staffing coverages, etc.) There may be irregular and/or high volumes and multiple and/or tight deadlines beyond one's control. Regular working hours, and on occasion some evening/weekend work required.