

Job Description

Job Title:	Records Coordinator
Department:	Office of the Registrar
Reports To:	Records Supervisor
Jobs Reporting:	None
Salary Grade:	USG 5-7
Effective Date:	July 2019

Primary Purpose

This career path position holds increasing levels of responsibility for the delivery of all functional activities related to student records processes. The incumbent maintains student records and the various procedures employed to track and assist students during their academic careers from the application stage through to graduation while demonstrating increasing ability to problem solve and lead. Responsibility ranges from entry level records maintenance to a leadership role, leading process and procedural projects and providing the day to day leadership required to ensure all activities are maintained, while resolving more complex problems. This competency continuum translates to all of the detailed accountabilities noted below.

The Records Coordinator (RC) maintains accurate undergraduate student records, and the various procedures used to track and assist students during their academic careers. This requires both Faculty specific and systems specific knowledge, especially when dealing with the many cases that deviated from the norm.

The RC provides written and oral information regarding policies and procedures of the university to students and departmental staff and faculty as it relates to student records.

Key Accountabilities

Record Keeping

- Maintains student records and the various procedures employed to track and assist students during their academic careers from the application stage through to graduation, within the Student Information System (PeopleSoft)
- Maintains student registration, including, but not limited to: add/drop activity, block enrolment, service indicators, term activation, unit load
- Maintains accurate student academic records, which include:
 - Transfer credit coding, exchange coding, letters of permission
 - Bulk grade assignment and grade revisions
 - Coding/verifying academic standings, honours and awards and transcript text information
 - Program/Plan changes
 - Student citizenship status, name changes
 - Student's tuition calculation
 - Academic progression (AP) processing
 - Maintain substitution spreadsheet, applying repeated course coding.
- Will be assigned projects or accountable for specialized coding

Communication & Stakeholder Focus:

Job Description



- The incumbent will respond to inquiries from students, UWaterloo Staff and Faculty Undergraduate Advisors
- The incumbent will provide additional support to the Customer Service Team that is the student's first line of contact when visiting the Registrar's Office. S/he will be expected to answer inquiries and deal with applicant directly to explain policies and procedures

Document Management System (DMS):

- Accurately match all documents received
- Index (paper and e-batches) to student's file
- Identify discrepancies and communicate these to the Systems team

Reporting

- Run standard queries to gather data from the Student Information System (PeopleSoft) to identify the various stages of completion of records activities.
- Required to have a thorough knowledge of business processes and practices to accurately identify discrepancies.

Portfolio responsibilities can include:

Faculty Petitions

- Receives, reviews and prepares petitions for consideration by Faculty Petitions Committee.
- Tracks petition decisions using the ACCESS system and communicates all decisions by letter, email or verbally to students.
- Petition cases typically present records scenarios that must be interpreted properly by the incumbent so that the academic record can be updated accurately.

Convocation

- Responsible for coding Intention to Graduate data in the Student Information System (PeopleSoft) as received. This activity supports the generation of bulk Academic Advisement (AA) Reports by the incumbent for submission to Faculty Advisors who use the reports to determine whether degree requirements have been satisfied.
- Creates recommendation forms to be used by faculty advisors and directly interacts with the advisor to rectify any student record issues before final degree status decisions. Alternatively, convocation spreadsheets have been adopted by some faculties to fulfill this same purpose.
- Checks changes to Academic Programs to ensure these are accurately coded and so that the correct degree will be assigned and displayed on the diploma.
- Interacts directly with students to discuss details pertaining to a student's convocation intentions.
- Responsible for assembling diploma packages, participating in the Convocation ceremony as well mailing diplomas to students who were unable to attend the ceremony.

**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

Education

- College diploma and/or Undergraduate degree and/or equivalent work experience

Experience

- Progressive experience with proven track record of success in student records of success in maintaining electronic people records.

Job Description



- Previous experience in a customer service position dealing with students and/or educational organizations is essential

Knowledge/Skills/Abilities

- Excellent data entry skills and proven aptitude for attention to detail and accuracy is required
- Excellent human relations / inter personal, organizational, problem solving and communication (oral and written) skills required
- Demonstrating ability to handle confidential information with discretion
- Demonstrated ability to maintain multiple tasks involving shifting deadlines and priorities
- Proven ability to work independently and as a team member in a busy deadline oriented and varied environment with changing priorities
- Knowledge of University policies and procedures relating to student records preferred
- Experience with Microsoft Word
- Experience with Microsoft Excel
- Basic experience with Microsoft PowerPoint
- Experience with Microsoft Access is an asset
- Experience using online Student Information Systems and DMS is an asset

Nature and Scope

- **Contacts:** Internally, communicates with faculty members and staff to respond to inquiries from different stakeholders: Registrar's Office Internal staff and Faculty Undergraduate Advisors Internal faculty directors and department heads Internal departments at UW CECA, SSO, OPD, Counseling Services, Finance Externally, makes contacts with partner organizations (2+2 agreements), Ontario high school students and counselors, out of province students, international students, other post-secondary institutions.
- **Level of Responsibility:** The job has defined duties and responsibilities and receives direct supervision. The job may include responsibility for oversight of casual or temporary staff
- **Decision-Making Authority:** Applies explicit guidelines and procedures in making decisions. Makes straightforward decisions based on adequate information. Deals with exceptions using clearly specified rules. Makes decisions by weighing several factors, some of which are partially defined and entail missing pieces of critical information. Supports and acts on decisions.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position (attention to detail, prolonged focus on computer monitors and prolonged sitting) This role requires exertion of physical or sensory effort resulting in slight fatigue, strain or risk of injury. It may involve constant interruptions from e-mail, face to face interaction and phone.
- **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 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 issues, advisor questions, staffing coverage, 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