

Job Description

Job Title:	Financial Aid Assistant – Special Programs & Work Study
Department:	Registrar's Office, Student Awards & Financial Aid Office
Reports To:	Director, Student Awards and Financial Aid
Jobs Reporting:	None
Salary Grade:	USG 6, 35 hr/wk
Effective Date:	March 2018

Primary Purpose

The Student Awards and Financial Aid Office of the University of Waterloo co-ordinates, on a University-wide basis, the development, management, evaluation and distribution of undergraduate awards including scholarships and bursaries. The Office is also responsible for the effective administration of government student financial aid programs to all students.

The Ministry of Advance Education and Skills Development (MAESD) is responsible for the Ontario Student Assistance Program and the related Part-Time and Bursary Programs. These programs provide needs based financial assistance to students attending the University. While the Ministry provides on-line access to the application process for OSAP it does not provide this convenience to these smaller programs. Although smaller in terms of volume and monies disbursed they are equally important and are an integral part of the Financial Aid Package available to students at Waterloo. The Ministry provides only general information/communication with the individual student leaving the bulk of the responsibility for communicating with the student to the Student Awards and Financial Aid Office.

This position is one of two Financial Aid Assistant positions reporting to the Director, they include the Financial Aid Assistant – Special Programs & Work Study and the Financial Aid Assistant – UW Bursaries and International Programs.

The incumbent must maintain a productive working relationship with managers and support staff in the Registrar's Office and other support areas particularly Student Financial Services, Finance, Payroll, Distance Education, AccessAbility Services, the Graduate Studies Office and employers of UW Work Study students.

The incumbent must maintain excellent communications and liaison with students and parents.

Key Accountabilities

Decision Making

- Applies explicit guidelines and procedures when making decisions.
- Comprehensive job knowledge and sound judgement is required with Financial Aid processing.
- Research/investigation is required for resolving complex problems.
- Counsel students and/or families with financial aid information and advice.

Administration of Government Financial Aid, PT Bursaries, BSWD and Work Study Program

- Administer Part-Time OSAP student loan and grants program on Ministry system, sending appropriate communications for fee arrangement and funding documents.

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- Administer UW Part-time Undergraduate Bursary/Award program. Confirmation of eligibility, coding of awards for both UG and Graduate students to Quest/PeopleSoft. Track academic progression for all applicants. Awards are recorded for reconciliation purposes.
- Administer Government Bursaries for Students with Disabilities based on MAESD's policies, procedures and guidelines. Coding on Quest and MAESD Bursary Recording System (BRS) and record on SharePoint.
- Administer Waterloo Work-Study Program (WWSP). Co-ordinate the advertising of the program. Maintain on-line job repository annually.
- Responsible for posting positions and subsequently sending out memorandums to the employers. Receive student work-study applications, edit and confirm eligibility for work-study, refer students for position interviews, accept hiring forms, mark filled positions on system. Process Waterloo Work-Study Plan Non-OSAP applications; process appeals.
- Create new procedures and implement changes to procedures for all programs in the portfolio as needed.

Reconciliation for BSWD and Work Study Program

- Reconcile the Bursaries for Students with Permanent Disabilities on to the GL account to the MAESD Bursary Recording System (BRS). Receipts for BSWD purchases logged on (BRS), refunds of unused bursary recorded for fiscal year reconciliation. Notices sent to students with outstanding documentation or receipts. Responsible for sending incomplete files to MAESD for follow-up after receipt deadline. Accountable for collecting internal compliance data for audit.
- Reconcile the Waterloo Work-Study payroll GL account each month. Advise Human Resources-Payroll with a summary of issues for corrections to be processed. Coordinate with HR to ensure only eligible students hours are charged to this account

Communication, Client Service and Team Work

- Respond to written, telephone and in-person inquiries from students, parents, and other departments regarding all Financial Aid Programs.
- Provide individual financial aid and BSWD counselling to students with information and advice.
- Connect regularly with the AccessAbility Services Office regarding MAESD guidelines providing updated summary of changes.
- Communicate as required with MAESD representatives, program administrators and program coordinators regarding procedures and policies.
- Maintain and share all relevant information with team members and management.
- Present Bursary for Students with Disabilities program information annually at the Accessibility Services Office Open Door session for "new" students and/or parents.

**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

- Undergraduate Degree preferred or equivalent work experience with some post-secondary education

Experience

- Extensive administrative experience in a customer service environment within the post-secondary sector required, preferably with government student aid programs. Experience administering

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government policies and procedures required. Knowledge of post-secondary policies and procedures related to admission and records required. Strong analytical and problem solving skills.

Knowledge/Skills/Abilities

- Intermediate to Advanced working knowledge of Word, Excel and SharePoint
- Experience in Microsoft Access beneficial
- Experience using PeopleSoft preferred or experience with a student information system
- Excellent interpersonal, organizational, communication, and analytic skills

Nature and Scope

- **Contacts:** Reports to Director. Working relationships with Accessibility Services, MAESD and campus wide employers.
- **Level of Responsibility:** The job has specialized work with minimal supervision and provides guidance to students, campus wide employers and counsellors/advisors in Accessibility Services
- **Decision-Making Authority:** Proven ability to work independently, and as a team member in a busy and varied environment with deadlines, changing priorities and large volumes of work. Demonstrated ability to assess a problem, challenge or opportunity and take initiative required.
- **Physical and Sensory Demands:** Proven aptitude for detail and accuracy is essential. The incumbent must be sensitive to the often extreme and prolonged stresses under which SAFA staff work. This role involved exposure to irregular and/or high volumes, multiple and/or tight deadlines beyond one's control, and interruptions (i.e. phone calls, emails and unplanned but urgent support requests at different times of the year).
- **Working Environment:** Office Based, some evening/weekend work may be required.