

## Job Description

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<b>Job Title:</b>	Financial Aid Specialist, Part-Time OSAP & Bursaries, BSWD and UW Work Study
<b>Department:</b>	Registrar's Office, Student Awards & Financial Aid Office
<b>Reports To:</b>	Director, Student Awards and Financial Aid
<b>Jobs Reporting:</b>	N/A
<b>Salary Grade:</b>	USG 6
<b>Effective Date:</b>	July 2022

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### Primary Purpose

Reporting to the Director this position is responsible for, for the effective administration of the Bursaries for Students with Permanent Disabilities (BSWD) program, Part-Time OSAP applications, Part-Time UW Bursaries and the UW Work Study program. These responsibilities include monitoring budgets allocated for the BSWD and Work Study programs for monthly and fiscal year reconciliation. This incumbent is responsible for reporting and forecasting BSWD budget increases due to expenditures.

The incumbent is responsible for maintaining excellent communications and is primarily the first contact for students and parents for the programs in this portfolio. This position is required to maintain a productive relationship with managers and support staff in the Registrar's Office and other internal support areas particularly Student Finance, Payroll, Accessibility Services, Student Centre, Graduate Studies and Postdoctoral Affairs, and UW Work Study employers across campus. This position is a liaison for both the Ministry of Colleges and Universities (MCU) who is responsible for the OSAP program and the National Student Loan Service Centre (NSLSC) who process and release OSAP loans and grants. The NSLSC is also responsible for the collection of OSAP loans.

### Key Accountabilities

#### **Decision Making**

- Applies explicit guidelines and procedures when making decisions
- Identify and gather information to assess alternative resolutions following policy guidelines
- Sound judgement and comprehensive knowledge required to solve complex problems related to financial aid and BSWD programs
- Establish priorities to ensure efficiency is met with the demand of the workload

#### **Administration of Part-Time OSAP and the BSWD Program**

- Administer Part-Time OSAP student program on Ministry Portal System including all Document Work Queues. Forward appropriate communications to students with information for fee arrangement, documentation required for confirmation of enrolment and for the release of funding
- Responsible for reporting to the NSLSC changes to students' academic progress such as withdrawals as per audit requirements. Communications are sent to students with the impact this has on funding and requirements to self-fund a term in order to receive further Part-Time OSAP
- Responsible for calculating and returning of funds from withdrawal/refund reports to the NSLSC
- Administer the BSWD program funded by the Provincial and Federal governments based on MCU's policies. BSWD approvals recorded on MCU Bursary Recording System (BRS) and an internal UW SharePoint. Accounts payable (AP) disbursements and accounts receivable (AR) settlements sheets

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<p>are uploaded through the SharePoint Finance Resource System. Review and update SharePoint permissions access for staff changes as required</p> <ul style="list-style-type: none"><li>• Create new procedures and implement these changes for all programs in portfolio as required</li><li>• Monitor the monthly and overall expenditure of each program and notify the Director if additional funds are required</li></ul>
<p><b>Administration of the UW Part-Time Bursary and UW Work Study programs</b></p> <ul style="list-style-type: none"><li>• Review all online Part-Time Bursary applications following internal procedures for both Undergraduate and Graduate students. Code bursary amounts to Quest as required</li><li>• Responsible for the administration of the UW Work Study program. This includes sending out emails to employers to create positions, posting the positions online, confirming student eligibility, recording hiring forms</li><li>• Responsible for monitoring spending of the funding allocated for the fiscal year</li></ul>
<p><b>Reconciliation for BSWD and UW Work Study Program</b></p> <ul style="list-style-type: none"><li>• Confirm that receipts for BSWD purchases are entered on the BRS and record all refunds of unused bursary for fiscal year reconciliation. Notices are sent to students with outstanding documentation or receipts. Responsible for sending incomplete files to MCU for follow-up after receipt deadline. Accountable for collecting internal compliance data for audit</li><li>• Maintain detailed SharePoint spreadsheets of disbursements and receivables for BSWD to assist reconciling monthly reports and fiscal year end</li><li>• Reconcile the Bursaries for Students with Permanent Disabilities (BSWD) by running reports in Unit 4 and comparing to the MCU Bursary Recording System (BRS) and to internal SharePoint files. This reconciliation is done monthly and the final report is done once per fiscal year.</li><li>• Reconcile the UW Work-Study payroll GL account each month. Advise Human Resources-Payroll with a summary of issues for corrections as needed. Coordinate with HR to ensure only eligible students' hours are charged to Work Study account</li></ul>
<p><b>Communications, Client Service and Teamwork</b></p> <ul style="list-style-type: none"><li>• Respond to written, telephone and in-person inquiries from students, parents and other departments relaying information regarding Financial Aid Programs.</li><li>• Provide individual financial aid and BSWD counselling to students with information and advice</li><li>• Connect regularly with AccessAbility Services Office for inquiries via email or Teams regarding MCU guidelines. Ensure AccessAbility Services staff are equipped with current years manual for reference and updated summary of changes</li><li>• Communicate as required with MCU representatives, program administrators/coordinators regarding procedures and policies and NSLSC</li><li>• Maintain and share all relevant information with team members and management</li></ul>

*\*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>• Undergraduate Degree preferred or equivalent work experience with some post-secondary education</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• Extensive administrative experience in customer service environment within the post-secondary sector required, preferably with government student aid programs.</li><li>• Proven ability to deal with difficult or sensitive situations with tact and diplomacy.</li><li>• Strong analytical and problem-solving skills.</li><li>• Experience interpreting complex government and institutional policies guidelines and procedures.</li><li>• Proven ability to prioritize, meet deadlines, and adjust to change.</li><li>• Ability to work both independently and in a collaborative, team-based environment.</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Intermediate to Advanced working knowledge of Microsoft Word, Microsoft Excel, and SharePoint.</li><li>• Experience using on-line student information system (Quest).</li><li>• Excellent communication skills, both written and oral.</li><li>• Professional Demeanor in interacting with students, staff, and faculty on confidential and sensitive matters.</li><li>• Experience with meeting multiple and concurrent deadlines.</li><li>• Ability to multi-task with completing and changing priorities to manage significant workload and responsibilities is required.</li></ul>

### Nature and Scope

- **Contacts:** Reports to Director. Working relationships include SAFA team, AccessAbility Services, campus wide employers, Student Finance, HR Payroll, Records and Admissions. Externally, this position will have contact with (OASFAA) Ontario Association of Student Financial Aid Administrators, MAESD and NSLSC. This role involves interactions with students, parents, staff, or faculty who may be upset with a decision.
- **Level of Responsibility:** The job has specialized work with minimal supervision and provides guidance to student, campus wide employers, and counsellors/advisors in AccessAbility 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 involves 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 during each day).
- **Working Environment:** Office Based, some evening/weekend work may be required.