

## Job Description

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<b>Job Title:</b>	Assistant Director, Financial Aid Process and Policy
<b>Department:</b>	Registrar's Office, Student Awards & Financial Aid
<b>Reports To:</b>	Director, Student Awards & Financial Aid
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 11
<b>Effective Date:</b>	January 2023

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### **Primary Purpose**

The Assistant Director, Financial Aid Process and Policy is responsible for the administration and overseeing of processes administered within the Student Awards & Financial Aid office (SAFA). This role is a subject matter expert and is accountable for the oversight of OSAP appeals and reports, OSAP Satisfactory Academic Progress reports, Confluence procedures, Quest refunding, communications and US funding including Sallie Mae and Veterans Affairs. This role also takes on the lead for processing emergency loan requests and OSAP Micro-credentials applications.

### **Key Accountabilities**

#### **Decision Making and Policy Interpretation**

- Leads resolution of complex problems acting as a resource for inquiries and issues on specialized funding and processes, including Sallie Mae funding, Veteran's Affairs, US Direct Loans and Emergency Loans processing.
- Applies sound judgement and comprehensive job knowledge to solve complex problems related to their portfolio of processes, which includes handling inquiries, authorizing disbursements, coordinating with Finance, and managing deferments, liaising with the funding department, aiding with external audits, and reconciling disbursements.
- Makes decisions by weighing several factors, some of which are partially defined and entail missing pieces of critical information.
- Assist the Director in assessing the impact of policy changes on the SAFA Office and the university at large and must plan and coordinate the implementation of revised policies and procedures in the SAFA office.
- Stay abreast of current research, philosophies and practices related to post-secondary financial aid programs to evaluate their relevance.
- Interpret and apply OSAP Academic Progress policy to student applications ongoing. Create and process the OSAP Satisfactory Academic Progress report each term applying the same rules and policies. Manage OSAP Academic Progress (SAP) by creating and running reports, monitoring grade reports, maintaining records, and responding to student inquiries.
- Interpret and apply OSAP refund policy to student applications with the weekly withdrawal (WDR) reports in collaboration with the Student Financial Services office.
- Provide guidance and clarification to the Financial Aid team with the OSAP refund report each term. This includes ensuring internal procedures stay up to date with current Ministry of Colleges and Universities (MCU) policies.

#### **Financial Aid Administration**

- Sets the tone for fair and compassionate oversight of appeals and exceptions and manages complex appeals processing and documentation.
- Administers the funding for all government programs which is primarily Ontario but includes student aid programs from other provinces and territories.
- Calculates, administers, and disburses U.S. student aid which includes navigating complex U.S. policies and computer systems.
- Calculates, administers, and disburses U.S. private student loans with Sallie Mae and coordinates funding disbursements with the Student Financial Services office.

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- Administer and process OSAP micro-credential applications and coordinate record keeping and enrollment records between various campus partners.

### **Administration and communication support**

- Maintains Financial Aid Confluence site as a staff resource.
- Oversees the development or modification of operational procedures as new systems and decisions are made.
- Takes lead in communication and forms, including updating OSAP forms, web updates, news items, blast emails for internal campus units.
- Runs weekly report, including Continuation of Interest Free Status (CIFS) and waiver reports.
- Coordinates with SFA on Late Fee Arrangements by managing a shared listing to track status, sending emails to assist students with late fee arrangement process.

### **Reporting and Record Keeping**

- Accountable for the maintenance of procedures and record keeping within their portfolio. This includes archiving documentation as required by MCU following their policies and procedures.
- Responsible for preparing and participating in regulatory audits.
- Complete the annual compliance audit and year end annual report for the US Direct Loans program.
- Complete recertification applications for US Direct Loans program every 3 to 5 years.
- Ensures that high record keeping standards are created and always maintained.

*\*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**

- University degree or post-secondary education and equivalent experience.

### **Experience**

- 5 years of experience managing/leading a large professional team, preferably in a post-secondary environment or financial environment.
- 5 years of experience working in a fast-paced service-oriented role, with demonstrated success in resolving challenging customer service issues, preferably in a post-secondary environment.
- Demonstrated knowledge and experience interpreting and applying policy is required.
- 5 years of financial aid (OSAP) related experience. Comprehensive knowledge of OSAP policies and procedures and how to apply them to OSAP applications.
- Knowledge of university policies as they related to OSAP program is xx.

### **Knowledge/Skills/Abilities**

- High degree of planning and coordination skills.
- Proven ability to deal with difficult or sensitive situations with tact and diplomacy.
- Demonstrated analytical and problem-solving skills.
- Experience interpreting complex policies.
- Excellent written skills, both written and oral, for varied audience
- Strong organization skills and ability to handle multiples tasks, meet deadlines, and excel in a fast-paced environment characterized by changing priorities.
- Intermediate skills level using QUEST (PeopleSoft Student Information System)
- Intermediate skill level with Microsoft Office suite of software.
- Understanding of issues and trends affecting post-secondary education.

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- Ability to think on the spot, improvise, solve problems, and make effective decisions independently in a fast-paced, challenging environment.
- Strong managerial experience and leadership skills dealing with diverse teams and situations.

### **Nature and Scope**

- **Contacts:** Must maintain a productive working relationship with managers and staff in the Registrar's Office as well as the Student Financial Services Office. Must also work effectively with the senior managers at other Ontario Universities and the Ministry of Colleges and Universities.
- **Level of Responsibility:** This position is responsible and accountable for the results of the Student Awards & Financial Aid Office. Must provide strong leadership to the team. The position is expected to develop business protocols and procedures to deliver a high level of service and experience for students and staff.
- **Decision-Making Authority:** Accountable for decisions related to the operation of services related to financial aid. Works directly with the Director, Student Awards & Financial Aid to address necessary changes resulting from strategic plans, academic decisions, university-wide initiatives, and government legislation.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment. Attention to detail, prolonged focus on computer monitors and prolonged sitting. Interruptions are frequent from staff, students, and other departments.
- **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 and constant interruptions (e.g., student issues, staffing coverage, etc.). There may be irregular and/or high volumes and multiple and/or tight deadlines beyond one's control. Regular working hours, some evening/weekend work may be required for campus events.