

Job Description

Job Title:	Graduate Financial Aid Records Specialist
Department:	Graduate Studies and Postdoctoral Affairs (GSPA)
Reports To:	Graduate Financial Officer
Jobs Reporting:	N/A
Salary Grade:	USG 7
Effective Date:	July 2018

Primary Purpose

The Graduate Financial Aid Records Specialist works closely with the Graduate Awards Officer and Graduate Financial Officer and provides support to the graduate awards team by processing award payments including awards paid from endowments, trusts, operating and research accounts. The incumbent will work closely with the Manager, Graduate Financial Aid Systems to assist with the configuration of set-up tables, to be able to complete upgrade testing of the Financial Aid (FA) and awards components of the student information system (Quest/PeopleSoft) and for Financial Aid payment records management using OnBase. Timely application of awards to the student account in Quest is imperative, as students require this information to facilitate tuition fee arrangements with the University and plan for program support including research expenses. The Specialist must interpret complex rules and regulations for both internal and external award payments for all graduate students. The Specialist must have a sound knowledge of university, provincial and federal policies and procedures related to awards, and must be familiar with all online systems related to maintenance of student financial aid records. It is essential the incumbent be knowledgeable in a variety of computer systems in order to assist the Manager, Graduate Financial Aid Systems with updating and maintaining FA tables, manuals and procedures, which support all FA student record keeping functions in the Graduate Studies and Postdoctoral Affairs (GSPA). Other tasks may be assigned as required throughout the year.

Key Accountabilities

Graduate Student Financial Aid Records

- Responsible for maintaining all graduate student financial aid records in the Student Information System (Quest), ensuring that funds are applied appropriately.
- Reviews award nominations and payment requests to identify ineligible students. Communicates decisions to academic units and students as appropriate.
- Using complex criteria for each program, determines and makes adjustments to awards based on changes to enrolment status, withdrawals, degree completions and immigration status, according to University refund policies and Tri-Agency/MAESD regulations (if applicable).
- On a daily basis, advises on award disbursement information and sends communications to awardees, departments, Faculties, administrative units. This activity includes problem-solving specific student account issues impacted by enrolment and immigration status, late nominations, tuition fee arrangements and payment cycles.
- Reviews and processes file uploads and completes manual data entry of all internal and external awards to ensure accurate and up-to-date Financial Aid records. Responsible for addressing and correcting any issues that are brought forward as they relate to program changes, change of status and withdrawal forms.
- Responsible for the setup/re-occurrence of FA processes to provide up-to-date student FA records before proceeding with the Financial Aid Authorization and Disbursement processing.

Job Description



- Prepares and updates detailed, specific operational and business procedures to support awards regulation requirements as they relate to Financial Aid.

Reporting and Reconciliations

- Maintains detailed spreadsheets of payments received and distributed for programs including Tri-Agency, MAESD and external sponsorships in order to complete confirmation of enrolment and fiscal year end reports. These detailed spreadsheets are used to assist in award entry where funding crosses multiple fiscal years.
- Enters and maintains OGS and QEII-GSST awards into the MAESD Bursary Recording System and generates reports to confirm accuracy of the entries.
- Maintains Tri-Agency Extranet system for CGS Master's Awardee updates.
- Monitors the Tri-Agency GSAP system for Scholarship Global Payments Reports to ensure payments are received and to advise the Graduate Financial Officer of any discrepancies.
- Regularly monitors external agency policies concerning payments, reporting and auditing requirements to ensure GSPA practices are in compliance.

Systems and Production Support

- Prepares Financial Aid documents for scanning into OnBase.
- Produces Query Reports, reviews configuration and schedules FA processes in Quest for Aid Year Activations, ISIR Row Inserts, FA term build, review status updates, authorizations and disbursements of funding.
- Provides input on requirements for Financial Aid business processes
- Participates in review and testing of business processes for financial aid systems

**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

- An undergraduate university degree or equivalent education and experience.

Experience

- 5+ years in university environment. Comprehensive knowledge of the university and graduate studies environment is preferred.
- Ability to work both independently and in a collaborative, team-based environment

Knowledge/Skills/Abilities

- Knowledge of Graduate Studies policies and practices related to financial aid, admissions, and academic/enrolment records
- Knowledge of university policies related to access and release of student information, information security, and records management
- Proven student/client service and interpersonal skills.
- Professional demeanor in interacting with students, staff and faculty on confidential and sensitive matters.
- Successful experience meeting multiple and concurrent deadlines
- Ability to multi-task with competing and changing priorities and manage significant workload and responsibilities is required.

- Excellent communication skills (oral and written)
- Excellent organizational and time management skills; adherence to timelines and deadlines is imperative.
- Proven experience with regards to accuracy, attention to detail, and problem solving abilities
- Intermediate to advanced skills with Microsoft Office is required – Outlook, Excel, Word, SharePoint
- Knowledge of and experience with financial aid records and Query Manager in PeopleSoft Campus Solutions (Quest) is strongly recommended.
- Knowledge and experience with document retrieval in Hyland OnBase Document Management is preferred.

Nature and Scope

- **Contacts:** Internal contacts include: GSPA staff, including the Admissions Specialists and Records Specialists; Awards Programs Team, Departmental Graduate Coordinators; Faculty Graduate Studies Coordinators; students; Registrar's Office; Office of Research; Finance External contacts may include: NSERC, SSHRC, CIHR and the Awards Branch of the Ministry of Advanced Education and Skills Development (MAESD)
- **Level of Responsibility:** The job has specialized work with limited supervision and provides guidance to others.
- **Decision-Making Authority:** Provides expertise regarding Graduate Studies policies and practices related to financial aid based on admissions, enrolment and graduation records. Makes recommendations on financial aid business processes and procedures
- **Physical and Sensory Demands:** Demands typical of an administrative position within an office environment – extensive sitting and concentrated attentive use of one or more senses while doing computer work; dealing with interruptions. Concentrated attention to detail is required in an office environment with competing priorities. The incumbent must be able to manage concurrent assignments and prioritize workloads in order to meet deadlines. Adherence to timelines is imperative as is attention to detail and ability to problem solve.
- **Working Environment:** Travel: minimal. Psychological Risks: The incumbent must be sensitive to the often extreme and prolonged stresses due to volume, deadlines, demands and interruptions (e.g., phone calls, e-mails, student assistance at the front counter and unplanned but urgent support request throughout the day). This role involves interactions with people who may be upset or aggressive (e.g., students who have escalated an issue, staff or faculty upset with a decision). Working Hours: regular working hours; overtime during peak periods may be required.