

Job Description

(For Positions in CAW Local 555, Unit 1)

Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.

JD #:	JD00002	Pay Grade:	8
JD Title:	Student Loans and Awards Officer	JD FTE Hours:	35
Job Family:	Student Services		

General Description

Responsible for the design of programs and services for students, and the administration, processing and delivery of multiple government and institutional financial aid programs including student loans, scholarships, grants, work study, bursary and emergency loan programs that promote financial accessibility and student retention. Coordinates, awards, and disburses provincial, federal, and institutional financial aid assistance programs and United States Direct loans. Provides guidance and advice to parents, staff, guidance counselors, applicants and a diverse undergraduate and graduate student population ensuring that they have access to the appropriate information and financial supports to successfully achieve their educational goals.

Representative Duties & Responsibilities

- Design programs and services to assist current and prospective students to obtain and manage their resources throughout their post-secondary career.
- Analyze how University, Ministry, and stakeholder policies interact with a student's ability to obtain and sustain funding and identify potential issues and develop solutions.
- Conduct analyses to determine the most appropriate and effective financial assistance options available to students.
- Develop customized strategies to help students overcome financial obstacles.
- Administer complex United States Direct Loans programs which requires determining eligibility, certifying enrolment, approving funding, liaising with the Student Accounts Office on disbursement of funds, recording transactions on the United States Department of Education systems, monitoring academic progress, and completing an annual audit.
- Interview students regarding financial issues, family history, personal choices, academic issues, and assess and evaluate the information provided.
- Adjudicate applications and determine students' eligibility to qualify for financial assistance, based on mathematical need calculation and program eligibility criteria, and disseminate information appropriately.
- Collaborate with the National Student Loan Service Centre to educate students on their financial obligations during in-course studies and post degree.
- Adjudicate work program applications to determine employer eligibility for funding.
- Allocate funds within budget, review employer reports to ensure eligible students are hired and transfer work program funding to employer accounts, reconcile and report to Ministry as required.
- Calculate and monitor payments and overpayments and determine student eligibility to apply for financial assistance by calculating annual income and ensuring alignment with the Ministry of Training, Colleges and Universities' guidelines.
- Interpret information provided through various government policy documents and processing guidelines to ensure that existing office procedures comply with inspections, audits, and government policies.
- Identify and contact the National Student Loans Service Centre and Ministry of Training, Colleges, and Universities on behalf of students to negotiate resolution and correct problems.
- Provide confidential advice to students including, but not limited to, the modification of course and program requirements, family and status changes, and income revisions and the impact that these changes have on financial aid eligibility.
- Provide advice to others about funding program requirements and options.
- Complete student withdrawals by calculating funding repayment amounts from generated tuition refunds and processing journal entries to institutional accounts and cheque requisitions to the National Student Loan Service

Representative Duties & Responsibilities

Centre.

- Monitor changes to student registration and funding eligibility by running and reviewing daily reports, adjusting records, and returning funds to the Ministry Training, Colleges, and Universities as required.
- Authorize payments of government and University funds and process journal entries, cheque requisitions, and batch payment programs as required.
- Approve requests for emergency loan program funding and establish terms of repayment which requires notifying Student Accounts and the School of Graduate Studies of the approved funding amount, requesting payment by cheque, and setting up the required payroll deductions.
- Authorize extensions to interest-free status to prevent students from prematurely entering loan repayment.
- Maintain accurate and complete hard copy and electronic records for all students who applied for or received financial aid and authorize changes to the records as required.
- Update all current financial aid student records and generate letters to inform the National Student Loan Service Centre of the student's study period end date and repayment amounts.
- Provide budget projections to the Director requiring a review of past expenditures and calculations for projected expenditures within a portfolio.
- Reconcile errors or discrepancies within the accounting system.
- Screen and edit student financial aid program applications.
- Write a variety of documents including, but not limited to, letters, correspondence, and reports.
- Prepare and submit reports to granting agencies and allocate and reconcile funds so that expenditures remain within the allocated budget.
- Write and modify queries to access multiple tables of data used to obtain information relevant to financial aid programs.
- Gather and compile information required to develop material for posting on the department website and for developing information and promotion materials.
- Create and update information documents, forms, templates, and applications
- Create spreadsheets to track financial and administrative information.
- Develop and follow procedures and implement programs within government, University, and department management team guidelines.
- Liaise with colleagues both internal and external to the University to discuss and understand a range of issues such as best practices, course load changes, and technical issues.
- Inform students of government and institutional policy, rules, and regulations to which they must adhere while receiving financial assistance.
- Refer at-risk students to the appropriate internal and external services and departments that offer specialized assistance to individuals in need.
- Participate in on-campus recruitment events to ensure Financial Aid Programs are understood and applicant, parent, and student inquiries are answered appropriately.
- Research and develop presentation material for information sessions and deliver presentations to applicants.
- Negotiate financial relief on the behalf of students with the National Student Loans Service Centre.
- Plan and coordinate meetings and information sessions.
- Plan, coordinate, and provide financial management tools, advice, workshops, budget, and financial counselling to students applying for, and in receipt of, government sponsored financial aid.
- Coordinate deadlines for work study and bursary applications.
- Research external funding sources available to students and provide students with information on available external funding options and banking programs.
- Read, interpret, and understand supporting documentation including, but not limited to, immigration records, protected person status documents, transcripts, legal affidavits, marriage certificates, death certificates, CRA income tax returns, and government assistance documents.
- Process appeals including, but not limited to, issuing notifications of ineligibility, placing restrictions on files, and approving assessment appeals.
- Maintain the accuracy of trust fund information expenditures and recipients for donor correspondence and endowment statements and improve donor relations by requesting and collecting thank you cards and letters from students in receipt of donor funding.
- Serve on both internal and external committees including, but not limited to, Bursary Appeal Committee and Hamilton Community Foundation's Chaney Ensign Selection Committee.
- Download data from external sources and upload data to the University financial tables. Work through generated error reports to correct data on Student Financial Aid and Scholarships and Ministry of Training, Colleges, and Universities systems.

Representative Duties & Responsibilities

- Ensure services are delivered efficiently with sensitivity to specific customer service needs.
- Maintain the confidentiality of student financial aid records
- Provide back up administrative support in the absence of other staff in the Office of Student Financial Aid and Scholarships.

Supervision

- Provide direction to others in how to carry out their work tasks.

Qualifications

- Bachelor's degree in a relevant field of study.
- Requires 3 years of relevant experience.

Effort

Physical Effort:

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
 - Intermittent periods of keyboarding to create documents, compose correspondence, and input data into spreadsheets and databases.
- Elements of moderate physical effort are not a regular feature of this job.
- Elements of high physical effort are not a regular feature of this job.

Mental Effort:

- A typical work day occasionally requires routine mental effort for activities such as:
 - Processing routine documents and completing routine word processing such as correspondence and forms.
- A typical work day consists of greater than 3.5 hours of moderate mental effort for activities such as:
 - Analyzing information including student transcripts, financial aid assessments, and student accounts.
 - Providing detailed information on financial aid programs and eligibility.
 - Informing students of rules and regulations to adhere to while receiving financial assistance.
 - Advising students by providing appropriate information on funding program requirements and options.
 - Interpreting information provided through various government policy documents and processing guidelines to ensure that existing office procedures comply with inspections, audits, and government policies.
 - Researching and developing presentation material for information sessions and delivering presentations to applicants.
 - Liaising with colleagues both internal and external to the University to discuss and understand a range of issues such as best practices, course load changes, and technical issues.
 - Providing budget projections to the Director requiring a review of past expenditures and calculations for projected expenditures within a portfolio.
- A typical work day consists of up to 3.5 hours of high mental effort for activities such as:
 - Designing programs and services to assist current and prospective students to obtain and manage their resources throughout their post-secondary career.
 - Analyzing how University and stakeholder policies interact with a student's ability to obtain and sustain funding and identifying potential issues and developing solutions.
 - Performing analysis required to determine the most appropriate and effective financial assistance options available to the individual student.
 - Developing customized strategies to help students overcome financial obstacles.

Working Conditions

Physical Environment:

- No adverse physical elements are inherent to this position.

Psychological Environment:

- Frequently required to meet competing deadlines relating to volumes of application processing and institution and government reporting, in addition to responding to drop-in inquiries and providing advice to staff.
- Frequently required to deal with irate and upset students and parents.
- Occasionally required to remain at work station during drop in counselling sessions.

Health & Safety:

- Risk to the incumbent is no higher than for the general population.

Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	JD00002	Pay Grade:	8
JD Title:	Student Loans and Awards Officer	Total Points:	529
Job Family:	Student Services		

Factor	Subfactor	Level Rating	Points
Skill	1. Applied Reasoning and Analytical Skills	4.5	94
	2. Breadth of Knowledge	2.0	13
	3. Adaptation to Change/Updating of Learning	2.0	12
	4. Interpersonal Skill	4.0	54
	5. Education and Experience	E3	100
	6. Dexterity and Coordination	2.0	12
Effort	7. Physical Effort	1.0	3
	8. Mental Effort	4.0	78
Responsibility	9. Planning and Coordination	3.0	46
	10. Responsibility for Others	2.0	33
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	3.0	66
Working Conditions	12. Physical Environment	1.0	3
	13. Psychological Environment	2.0	10
	14. Health and Safety	1.0	5