

## Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name: Amy D'Silva

Position Title: Financial Aid Officer

Payband: H

Position Code/Number (if applicable): S00354

Scheduled No. of Hours: \_\_\_35 per week

Appointment Type:  12 months     Less than 12 months (please specify # months: \_\_\_\_\_ )

Supervisor's Name and Title: Greg Nelson; Manager, Student Financial Services

Completed by: Lois Fleming/Drew Van Parys

PDF Date: December 15, 2023

### Signatures:

Incumbent:  
*(Indicates the incumbent has read and understood the PDF)*

Date:

Supervisor:

Date:

## **Instructions for Completing the PDF**

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can, based on the typical activities or requirements for the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements.**

## **Position Summary**

Provide a concise description of the overall purpose of the position.

As a Financial Aid Officer, the incumbent is responsible to independently assist students, parents, faculty and departments in collaborating, anticipating, facilitating, identifying, and resolving multi-tiered complex issues related to funding sources to finance a student's education.

1. Administers government loan and grant programs to help students finance their education, positively impacting student retention and fiscal health. The Officer exercises discretion, independent judgment and critical analysis of a student's situation with respect to developing educational financing plans for students; ensuring regulatory compliance with frequently-changing Ministry standards; and interpreting complex Ministry requirements for the Ontario Student Assistance Program (OSAP), as well as out-of-province government aid programming. Allocates federal/provincial student loan funding and institutional funds to full-time and part-time students, verifying application information and determining the validity of documentation.
2. Supports retention by advising students, parents, staff, and faculty regarding the required policies and procedures of the OSAP program administration. Counsels students with respect to the financial implications/complications who are looking to withdraw from the College or reduce their course load, especially if they are receiving OSAP funding.
3. Provides academic advising, in tandem with, knowledge of all services and processes in the Office of the Registrar that impacts the student journey.
4. Develops and delivers presentations/workshops on student financial assistance, financial planning and budgeting to departments and clients within and outside of the college to area high school students, third party community agencies (e.g. OW, ODSP, employment training centres, settlement centres, etc.)
5. As Subject Matter Expert when it comes to maintaining knowledge and the stewardship of OSAP regulations the incumbent represents Financial Aid on Fleming committees specifically related to strategic planning and operational projects and procedures. Represents Fleming on provincial and federal financial aid association committees and working groups.
6. Makes independent decisions that support the interest of students and the college with a proven ability to handle student, public, agency and staff inquiries while exercising a high degree of confidence, discretion, diplomacy and tact.
7. The incumbent is responsible for design and implementation of system process improvements including upgrades to the bursary application. The incumbent must work closely with the Business Analyst to ensure any upgrades, system or process improvements are implemented accurately and in a timely manner keeping the financial aid application cycle in mind.
8. Regularly analyses and co-ordinates a variety of data sets such as OSAP YTD file, OSAP student application, Fleming College Bursary Applications, Financial Aid reports and Evolve Student Centre. Coordinates and executes a variety of system maintenance processes and data file uploads and downloads. Incumbent is the key point of contact for Business Analysts with regards to Financial Aid system upgrades, projects, process improvements and testing.
9. Responsible for the training of student worker to complete Records Retention and Management procedure.

**Duties and Responsibilities**

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*
<p data-bbox="220 485 1284 590">Advises, evaluates, &amp; recommends student assistance programs (e.g. financial aid, awards, bursaries, scholarships, and on-campus employment opportunities), in conjunction with academic advising and RO services, policies and procedures.</p> <ol style="list-style-type: none"> <li data-bbox="256 632 1214 699">1. Interprets and explains to students the policies and procedures for financial aid programs (e.g. OSAP, internal &amp; external awards, bursaries, &amp; scholarships).</li> <li data-bbox="256 741 1321 993">2. Oversees the OSAP appeal process by ensuring compliance with established policies, procedures and processes. Advises and guides students on the appeal process, including parameters, policies and supporting documentation requirements. Investigates and reviews complex appeals on a case-by-case basis, approving/rejecting appeals within own authority levels. Prepares program cost code tables for each college year; for the above campuses. Determines which appeals to forward to Ministry and prepares and presents the appeal on behalf of the student.</li> <li data-bbox="256 1035 1321 1140">3. Assesses financial need to accommodate unique situations through tuition fee deferrals, food or book vouchers, emergency bursaries, or external financial aid options to assist with student retention.</li> <li data-bbox="256 1182 1273 1249">4. Reviews of students' individual financial situations and counsels' students regarding loan obtainment, repayment, overpayments, and maintenance.</li> <li data-bbox="256 1291 1321 1501">5. Liaises with the Ministry and internal contacts regarding loan applications, guideline documentation, and document requirements. Corrects and analyses errors/problems detected by Ministry. Identifies and submits student fraud cases to the Ministry. Ensures refunded fees are directed to the correct area, i.e. Ministry, programs, NSLSC. Maintains accurate individual student files to reduce cases of fraud/loan default. Verifies academic progress/course load changes to identify possible over awards.</li> <li data-bbox="256 1543 1321 1610">6. Maintains currency with regards to frequent policy and procedural revisions made at the Ministry, college and departmental levels.</li> <li data-bbox="256 1652 1117 1686">7. Administers part-time student loan program and advisement sessions.</li> <li data-bbox="256 1728 1289 1833">8. Interprets, explains and provides guidance and direction to students and other stakeholders for successfully navigating policies and procedures for RO services and academic requirements to assist in student success and retention.</li> <li data-bbox="256 1875 1305 1942">9. Analytically reviews edits, processes and maintains the record for all full-time and part-time OSAP applications, and ten Out of Province Programs including processing of</li> </ol>	<p data-bbox="1357 495 1419 529">30%</p>

<p>supporting documents, analyzing and completing end of term processes and reports, reviewing and completing ministry work queues, completing out of province program information forms and release of funding confirming enrolment and release of funding and redirection of funds</p> <p>10. Using OSAP Year to Date (YTD) file analyzes data and anticipates where possible, other options available to maximize student's funding.</p> <p>11. Monitors student's academic performance and notifies them, in writing, if they have failed to meet MCU (OSAP) academic requirement. Notification is sent to the Ministry to inform of student Academic Probation or Restriction status.</p>	
<p><b>System Maintenance, Analysis and Development</b></p> <ol style="list-style-type: none"> <li>1. The incumbent is responsible for design and implementation of system process improvements and application upgrades. The incumbent is the main point of contact with the Business Analyst for all systems and data related projects including the implementation of upgrades and new processes to leverage the system to create efficiencies, this includes identifying issues, solutions, timelines, and completing testing. The incumbent will investigate and identify processes and procedures that can be automated to create a streamlined workflow and create efficiencies and improve accuracy.</li> <li>2. Monitors, analyzes and audits process and data to identify any issues and implements corrective actions.</li> <li>3. Download and manipulates files to enable the upload of information to Evolve or to OSAP system to create efficiencies and ensure accuracy of data being loaded into each system. Develops reconciliation processes to ensure accuracy of data.</li> <li>4. Determines errors and trouble shoots issues with file loads and takes action to correct errors.</li> <li>5. Using analytical skills and in-depth process knowledge and knowledge of the OSAP system, develops new systems applications such as the bursary application, uploading student identification numbers to MCU, etc. to create efficiencies, improve accuracy and streamline processes.</li> </ol>	<p>25%</p>

<p><b>Data Analysis, Management and Reporting</b></p> <p>Using a variety of system reports and queries, the incumbent updates student applications, i.e. Withdrawals, academic probation, Full Time to Part Time status changes; program changes and/or reinstatements, student ID entries or updates and SIN validation process.</p> <p>Coordinates and disseminates bursary application detail once all staff have completed assessing eligibility. Reviews and analyzes data set to support the bursary adjudication process. i.e. correction of Status updates, financial need calculations; application updates that are in error due to application used to enter information.</p> <p>Prepares and verifies file for Bursary Group posts conversion and uploads to Evolve system. Coordinates with Systems, Cashiering and Finance Department for cheque production.</p> <p>Loads YTD daily to update information to EVOLVE system for use by Systems, Student Accounts, Financial Aid etc. Assists in Systems testing for upgrades/patches/bundles.</p> <p>Provides Associate Registrar with data and reports to aid in determining budgets, bursary allocations, etc.</p>	<p>20%</p>
<p><b>Bursary Application Processing and Adjudication</b></p> <p>Evaluates and processes Fleming College on-line bursary applications as well as General, SAG and Emergency Bursary applications. Reviews each application for reasonableness and accuracy. Determines student eligibility for bursary funds and processes bursary approval transactions. Notifies students who are ineligible and provides options for next steps. Notifies eligible students with respect to their eligibility and next steps.</p> <p>Manages Donor bursary database and runs queries to determine candidates, updates bursary code tables and creates new codes as needed</p> <p>Reconciles Grocery cards and their disbursements to ensure that all are recorded correctly  Updates the Ministry Bursary Recording System to reflect bursaries approved for OSAP students including Student Access Guarantee (SAG) allocations and approvals.  Compose and revise mail merge documents for email notification to students for all bursaries</p>	<p>10%</p>

<p><b>Communication and Information</b></p> <p>Communication/information sharing and develop presentation slides, brochures, and handouts, coordinate, and present OSAP financial assistance and budgeting workshops to educate students, parents, and outside agencies</p> <p>Ensures current understanding of frequent OSAP policy and procedure changes.</p> <p>Responsible for ensuring that Financial Aid communication and information tools are up to date and maintaining the myCampus student portal updates and external website.</p> <p>Shares information on loan default programs, financial literacy/wellness, financial counselling, and internal &amp; external award, bursary and scholarship information to aid in keeping our OSAP loan default rates low.</p> <p>Liaise with a variety of internal and external agencies Discuss issues with external government agency caseworkers to provide student with interim financial funding until their OSAP issues are resolved. (e.g. Ontario Works, Employment Insurance).</p> <p>Contact National Student Loans Service Centre (NSLSC) representatives and/or MTCU, along with out-of-province agencies regarding any issues with the disbursement of students' funding.</p>	10%
<p>Other related duties as assigned</p>	5%

\* To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10%	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

## 1. Education

**A** Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

- Up to High School                       1 year certificate                       2 year diploma
- Trade certification                       3 year diploma / degree                       4 year degree or 3 year diploma / degree plus professional certification
- Post graduate degree (e.g. Masters) or 4 years degree plus professional certification
- Doctoral degree
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- Field(s) of

Study:

Business/ Office Administration **Business, Education, Finance/Accounting, Social Services, English, Communications, or related field of study**

**B.** Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirements obtained by course(s) of a total between 101 and 520 hours
- Additional requirements obtained by course(s) of a total of more than 520 hours


## 2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

- Less than one (1) year
- Minimum of one (1) year
- Minimum of two (2) years




- Minimum of three (3) years

Experience in a financial aid environment including advising prospective students on financial aid programs, working independently in a front line, customer service, deadline driven, self-directed team environment prioritizing, organizing and problem-solving own work

Thorough knowledge of government, university, bank and private financial aid and award programs.

Demonstrated experience dealing with sensitive and confidential information and the F.O.I. Act. and relating to students from varying social, academic, economic and cultural backgrounds. Analytical and creative problem-solving skills resolving a diversity of complex problems on a daily basis and to develop and recommend creative solutions to address student financial needs in order that they may begin/continue with their academic studies. A quick analytical thinker in order to respond accurately on the spot to a student's concern.

- Minimum of five (5) years

- Minimum of eight (8) years

### 3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#### #1 regular & recurring

Key issue or problem encountered.

The department has been performing manual processes that occupy a great deal of the staff's time and need to be automated.

How is it identified?

The incumbent will investigate and identify processes and procedures that can be automated to create a streamlined workflow and create efficiencies and improve accuracy.

Is further investigation required to define the situation and/or problem? If so, describe.

Ministry postings regarding automation and upload functionality. Contact with other colleges regarding best practices and membership on committees bring new practices to light.

The incumbent needs to investigate the system and file requirements needed for the project. This could require the creation and/or manipulation of data files or creation of macros to enable an automation or upload to be successful. Incumbent may consult with the Business Analyst or IT department to come up with a suitable solution to automate the process if the project gets too complicated. The incumbent uses advanced knowledge of systems and processes to complete this task.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Investigation and identification of current processes and procedures that could be automated to create a streamlined workflow, create efficiencies and improve accuracy of data. Determines errors and trouble shoots issues with file loads and acts to correct errors.

Careful review of ministry requirements for an upload functionality or automation are required to determine the best way to approach the changes required to files and data. Ensuring that all pertinent policies and procedures are followed for the ministry and the college in coming up with a solution is essential. A sound understanding of how the student system processes data and the type of data that is being stored in the system is required.

Ensuring any new process put in place is easy to use and can be utilized by all staff in the Financial Aid department.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

Ministry documents explaining the requirements for the automation. A thorough understanding of different file types and the ability to determine the most efficient way to have the process implemented and maintained. Past practice, a thorough understanding of the data sets and their relationship to the system and own judgement. Consultation with supervisor, Business Analysts and IT systems people as well as co-workers when required. Thorough understanding of policy and procedures for college and ministry in place for data and privacy of information transferred.

Using analytical skills and in-depth process knowledge and knowledge of the OSAP system, allows the development of new systems applications such as updates to the bursary application, uploading student numbers BRS uploads, progression uploads to MCU, and YTD files to EVOLVE

## Analysis and Problem Solving

### #2 regular & recurring

key issue or problem encountered

Student has applied for OSAP, but their OSAP assessment falls short of their financial need. The student is anxious and concerned about their ability to afford their post-secondary costs.

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How is it identified?

Issues are not readily identifiable. Each situation can be unique and considerable investigation is required from multiple sources (ie. OSAP policy, eligibility, review guidelines, data analysis) to determine the problem and suggest possible resolutions to the student that could potentially increase OSAP assessment.

Is further investigation required to define the situation and/or problem?  
If so, describe.

To determine areas in the OSAP application that could be recalculated, the incumbent must examine how the student completed their OSAP application by carefully examining each section of the application. Using the MCU OSAP portal to review potential changes, updates or assessments that could be considered under the OSAP processing and policy guidelines. Using the OSAP Year to Date (YTD) file consisting of 157 data fields, the incumbent analyzes and reviews the data to identify data elements or a combination of data elements that identify circumstances where a student may meet criteria for other funding considerations. A review of funding maximums would be required to ensure that overall funding does not exceed established thresholds.

The interpretation of a range of broad government policy/eligibility and assessment guidelines is crucial and has a significant impact on the student's ability to access further OSAP funding.

Alternatively, because of a student inquiry, the incumbent would engage a similar review for the individual student to determine if there are other funding options available.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

The incumbent must have a clear understanding of the OSAP policy, eligibility and assessment criteria and the OSAP Review Manual and Processing Guidelines and must be able to recommend possible reviews to assist students in the wide variety of scenarios that are presented each term. Through discussion with the student, the incumbent identifies errors or omissions in the application and makes the necessary correction(s). Arranges for the documentation required to substantiate the amended application.

The incumbent uses their sound understanding of OSAP policies, processing guidelines and assessment criteria to identify opportunities to enhance the student's funding through the recommendation of reviews which are unique to the student's circumstance. Each review requires supporting documentation that must be examined closely to reach a decision. Since OSAP guidelines are broadly defined, and often open to interpretation, the incumbent uses sound, independent judgement to support their decision when adjudicating all reviews.

Where the incumbent determines that funding falls short of the student's need or where the student does not qualify for OSAP, the incumbent will determine the level of student crisis and counsels the student and/or family to a successful solution exploring alternative financial options to supplement the student's resources including external and internal awards, bursaries, on-campus work study employment, student lines of credit or emergency bursary funding.

The incumbent may also conduct a number of data filters and identify specific criteria that may result in additional funding. i.e. Identify all students who identify as living at home greater than 30km from institution – may be eligible for local travel funds; analyze pre-study income amounts to make sure none exceed the flat rate cap.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices established standards or guidelines).

OSAP Administrative Guidelines; OSAP Policy and Review Manual; Ministry Information portal. Above documents provide policy guidelines however, many are open to interpretation depending on the individual student circumstance. Past practice, a sound knowledge of OSAP parameters, own judgement and consultation with colleagues.

**#3 regular & recurring**

Key issue or problem encountered

A student has been evicted from their home and/or do not have enough resources to pay their rent and they don't have any money left.

How is it identified?

The student will arrive in the financial aid office looking for an immediate solution.

Is further investigation required to define the situation and/or problem? If so, describe.

Yes, significant investigation is required. The incumbent is required to meet with the student to understand the details of their specific situation. Are there others involved, how did the eviction come about? What are the student's expectations in terms of outcome? The incumbent will also review with the student what financial resources they may have already received, and they will discuss how those resources have been spent.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Based on the outcome of the above discussion, if there is an immediate/serious underlying circumstance, the student will be referred to the counselling department for guidance. With respect to the financial circumstance, the student will be required to provide a budget outlining their most immediate need and what resources they will require to see them through to the end of the semester – this will determine whether the need is genuine or if there is a resource management issue. – Are there inconsistencies in the information provided – are the expenses presented valid. A review of the student's OSAP application will occur to see if loans have been maximized; bridge financing may be provided if appropriate; and/or a bursary may be provided to assist. Where resource management is an issue a review of budgeting and/or referral for credit counselling may also be appropriate

What sources are available to assist the incumbent finding solution(s)? (eg. past practices established standards or guidelines).

Past practice, department guidelines and consultation with colleagues are all sources of information for solution

**3. Analysis and Problem Solving**

## #1 occasional

Key issue or problem encountered

The incumbent identifies a student at-risk (should not be left unattended or encouraged to leave without seeking the appropriate professional support) who does not appear to be responding to information provided to them. The student is becoming emotional and/or irrational in their behaviour.

How is it identified?

This can be a common response to their current financial circumstance – a sense of desperation and not knowing what to do. Verbal and visual indicators such as body language and tone of voice, lack of engagement in the conversation and current emotional state are good first indicators.

Is further investigation required to define the situation and/or problem? If so, describe.

In most circumstances, additional information is required to determine the immediacy of the problem. The incumbent will invite the student, if appropriate, to a more private environment to discuss in more detail the issue at hand. The student will be encouraged to share more details so that an appropriate action can be initiated. Using their knowledge of available college services, the Financial Aid Officer will refer to the appropriate Service Area or resolve the issue directly.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Depending on the details provided by the student, the incumbent will evaluate the options available to them i.e. is there a need to provide additional financial options to alleviate the student's distress; or if the issue is of a more serious personal nature take immediate action to refer to counselling or health services. The incumbent has to use sound judgement in determining how far they probe with the student. Incumbent needs to always be aware of personal boundaries and knowing when to quickly and appropriately refer to others. The incumbent must also be aware of the diverse nature of the student population.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

Past practice and experience working with students in crises form the basis of decision making. This combined with knowledge of college services and internal professional support such as counsellors. Team member support is available as a guidance/reference point for decision making. Special circumstance may not have a solution readily available and could be referred to the manager.

**#2 occasional**

Key issue or problem encountered	An OSAP fraud is detected which could result in a student receiving funds under ineligible circumstances.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes. This is a delicate situation that requires the incumbent to approach the suspicion with tact and diplomacy. Need to be sure that the issue identified is not just one of human error but one with intent and done so with knowledge.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Review the file to identify/isolate the potential problem. Meet with the student and/or parents/spouse to review circumstances, identify outstanding issues, request clarification of details and additional supporting documentation if required. Makes a decision to restrict OSAP eligibility and recommends further investigation by MTCU – Student Support Branch – Compliance and Investigation.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	MTCU policies and procedures Past experience is a reliable barometer in determining the legitimacy of an inquiry.

**4. Planning/Coordinating**

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.



Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

<b>#1 regular &amp; recurring</b>	
List the project and the role of the incumbent in this activity.	The incumbent is responsible for maintaining the accuracy of information within their own portfolio of students and tracking and recording changes as follows: OSAP status changes, program withdrawals, program changes, program extensions, institution changes, marital status updates, dependent children changes, student/parental/partner income changes and academic progression; full income variance.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Incumbent must organize and plan to regularly run reports. Must be able to break down large data sets into manageable sections to evaluate and ensure the application accurately reflects current circumstances. Requires sound time management skills, communication and listening skills, strong process skills including the ability to employ a variety of methods of persuasion to complete the activity.
List the types of resources required to complete this task, project or activity.	The details or data source to update a student OSAP record is sourced from a variety of places; academic and student record, student account, past OSAP records, bursary applications, current and past student communication, past and current OSAP policy/procedure. Incumbent is required to review and disseminate the information to determine what changes or amendments are required.
How is/are deadline(s) determined?	Deadlines are determined by a number of factors – the time of the application in reference to the study period start and end date; the timing of the event that created the status change on the OSAP application in the first place; the funding mechanisms in play at the time, and deadlines as laid out in the College Academic Schedule. There are many significant competing deadlines and timeframes under consideration.
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent is responsible for determining whether changes to a student account are required. The incumbent also determines whether the changes have an impact. i.e. Student's bursary application reflects an income change or status that is contradictory to their OSAP application. The incumbent must determine if the timing of this change is detrimental to the student's OSAP funding and to what extent.

#### 4. Planning/Coordinating

##### #2 regular & recurring

List the project and the role of the incumbent in this activity.

Bursary Evaluation. The incumbent is responsible for the evaluation and approval of various Fleming College Bursary Applications - such as the Financial Need Bursary for First Year and Upper Year students. The incumbent must analyze each application to determine eligibility of the student for funding assistance and be accountable for the decisions made. The incumbent must communicate with each student to convey the bursary decision.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Effective and timely management of a large volume of applications and the associated data sets. On-line bursary application data is reviewed through queries and reports. Data needs to be broken down into smaller data elements and filtered to analyze like applications and circumstances. A reasonableness test is applied to each application to ensure it meets baseline eligibility requirements.

List the types of resources required to complete this task, project or activity.

Maintenance queries and reports; OSAP Administrative Portal and OSAP AS400; bursary processing standards and policies, past practice and incumbent's judgement and discussion with Financial Aid colleagues.

How is/are deadline(s) determined?

Deadlines for bursary applications and adjudication are established annually and published; dates are based on past practice and expectations.

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

Incumbent can make changes to the processing and awarding timeframe as long as the timing remains within the original end date. To make any changes to the bursary dates the incumbent must be aware of Cashier and Finance Department timelines for bursary posting and cheque requests. Changes outside the published end date are referred to supervisor

##### #3 regular & recurring

List the project and the role of the incumbent in this activity.

Issuance of OSAP Academic Restriction letters; updating OSAP record – notifying Ministry of status. At the end of each academic semester the incumbent is required to review the file of each OSAP applicant who has failed to maintain satisfactory academic progress. In doing so, the incumbent must determine if this is a first-time occurrence thereby requiring a warning, or a second offence which will require OSAP restriction. There is a small window of time to plan for and coordinate many tasks between the end of one semester and the start of the next.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Time management, self-discipline, solid communication skills and attention to detail are essential. Organizational skills to prioritize and complete tasks to respect the semester end date and start of next semester. Strong process skills, including the ability to employ a variety of methods of persuasion to enlist other college departments to provide information required to complete the task. The ability to interpret and extract information from Evolve and OSAP on-line systems to determine student academic success rate as it relates to continued OSAP eligibility.

List the types of resources required to complete this task, project or activity.

OSAP Academic Progress guidelines as set out in the OSAP review manual. Student's Academic Record. Student's OSAP Application.

How is/are deadline(s) determined?

Deadlines are determined by the incumbent and Financial Aid Team. At times the deadlines are guided by the academic schedule and business processes of the department.

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

The incumbent in consultation with the Associate Registrar determines if changes to the timeline are required. Changes to this activity can affect students and other Academic Institutions in that a delay in completing academic progress warning or restriction could cause OSAP to be released to a student who is no longer eligible or cause a delay in funding.

**#1 occasional**

List the project and the role of the incumbent in this activity.

Open House – Financial Aid Presentation. Incumbent is responsible for coordinating, organizing and preparing the presentation materials.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Incumbent requires organization skills to pull-together all the details for the presentation which is based on ministry policy and procedure changes and the OSAP application process.

List the types of resources required to complete this task, project or activity.

MAESD OSAP Policy and Procedure manuals; College tuition fee policies and deadline dates; academic schedule

How is/are deadline(s) determined?

The dates of the actual events are determined by the college Marketing Department. However, the critical path dates leading up to the event are established by incumbent in consultation with the Financial Aid Team keeping in mind the various touch points i.e. Duplicating Department production timeframe, ministry consultations etc.

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

Presentation and materials are determined by the incumbent, the Open House Event is managed and coordinated by the Liaison and Recruitment Office.

**#2 occasional**

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List the project and the role of the incumbent in this activity.

The incumbent is developing a process to automate data exchange from the MCU OSAP system to Evolve and from Evolve to the MCU OSAP system

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Ability to analyze inbound and outbound data for errors or inconsistencies. Knowledge of data structures, data values and file parser functionality. Determine best approach to correct the error or inconsistency, if the incumbent can correct the error independently, if Business Analyst has to be involved, or if the error/inconsistency originated at MCU OSAP or in Evolve. The incumbent is often working within tight deadlines that if not met could result in students not receiving funding in a timely manner.

List the types of resources required to complete this task, project or activity.

In-depth knowledge of processing functionality, ability to determine origin of error/inconsistency, past practice, ability to ascertain extent and severity of error/inconsistency and next steps to correct error/inconsistency.

How is/are deadline(s) determined?

Deadlines are determined by the incumbent to ensure all files can be processed and are processed for the appropriate student and by system and College deadlines. .

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

The incumbent determines if changes are required based on potential impact. The incumbent determines, in consultation with Business Analyst and Associate Registrar, whether the changes will have an impact on others and the potential severity of the changes. For example, if there is an issue with the data and the automated upload will not be corrected in a timely fashion, does the incumbent remove the records that are the issue, upload the remainder of the records, or determine that the best approach would be to manually key the entries.

#### 4. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

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Regular & Recurring	Occasional	Level	Example
X		Minimal requirement to guide/advise others. The incumbent maybe required to explain procedures to other employees or students.	The incumbent is called upon to explain or clarify Financial Aid policies and guidelines to colleagues, other College departments, parents, students, other government offices as required.
X		There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	<p>The incumbent is called upon to provide advice to students, staff and third parties and direction regarding OSAP processing procedures, funding release, academic progress impacts etc.</p> <p>This ranges from updating status attributes in a student's file to a complex series of OSAP system processing steps to complete a program reinstatement; program change or course load change including documentation steps and direction on determining if the outcome is correct.</p> <p>The incumbent works with the student to complete their appeal/review process from start to finish. They guide the student in preparing the appeal/review.</p>
X	□	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities	<p>YTD file upload into the EVOLVE system. Requires a great deal of attention to detail as errors can cause major issues in the student system. Updating the YTD allows other staff in other departments and own department to work with the updated information in the EVOLVE system.</p> <p>Advises and recommends to students the appropriate action required with respect to a variety of academic issues and/or</p>

x

The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.

options available so that OSAP and/or bursary funding is not jeopardized. Demonstrates and advises of the impact of a variety of OSAP transaction events.

The Financial Aid Assistant contacts the Incumbent via messenger, e-mail or in person for instruction regarding a specific student inquiry. Incumbent will assess the individual situation with the staff member to prescribe the best course of action. Often these requests are outside the standard knowledge base of the Financial Aid Assistant and require the incumbent to provide guidance with respect to process and procedure.

□

x

The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.

Incumbent has the assigned responsibility to train student workers to complete the tasks related to the Records Management process. Using expertise, advice and guidance to direct the student worker and to ensure that the task is completed on time and correctly. Must explain and demonstrate the proper procedure and track progress to complete the task on time and keep on top of changes to the process.

## 5. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>Very few instructions are provided at the beginning of a work assignment. The incumbent is expected to evaluate what tasks are to be completed daily and rearrange priorities as circumstances require. There is a considerable amount of autonomy in this position. Incumbent is expected to search out appropriate information if unknown, and work to establish best course of action.</p>	<p>Brief instructions will be provided when venturing into a new project or set of circumstances to get the project started.</p>

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>Ministry OSAP Program            Guidelines OSAP and OCAS            Websites College Calendar and            Website Academic Schedule            Student Academic and Financial Record            Admissions Policies and Procedures            Student Rights and Responsibilities            Academic Regulations            OASFAA Forum Discussion</p>	

How is work reviewed or verified (eg. Feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>The position requires that deadlines be met. Monitoring is done through verbal communication and inquiry on an occasional basis. Random file spot checks are conducted by supervisor to ensure program compliance. Department meetings as needed provide an opportunity for round table discussion and feedback on various situations, practices and procedures.</p>	<p>A full ministry – OSAP audit is conducted every three years.             Random inspections are conducted by the Ministry Compliance and Verifications Branch.</p>



## 6 Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)
	<p>Incumbent will consult with MCU (OSAP) if there is no established best practice regarding an unusual OSAP situation.</p> <p>Questions related to the Bursary for Students with Disabilities may arise which requires consultation with a counsellor before a funding decision can be made.</p>

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>The Incumbent also refers highly confidential and or complex Appeal Board cases for information and resolution</p> <p>Budgetary matters and/or part-time staff hiring. Changes/recommendation to process/procedures</p> <p>Hiring of part time staff</p>	<p>Irate and/or upset students, parents, faculty or public who will not accept policies and procedures.</p> <p>Situations which involve controversial issues where M.P., lawyer, parent or community agency are involved.</p> <p>Recommended changes to processes and/or procedures</p> <p>Incumbent refers unusual/controversial cases regarding issues involving M.P., lawyers, parent or agencies.</p>

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>Incumbent will be asked to speak to their understanding of a student's eligibility for OSAP, bursaries, scholarships and/or other awards. Independence in this respect occurs daily. This is all done within the context of understanding that a student receives what they are entitled to, that the integrity of the public purse is intact, and that the best interests of the college are considered.</p> <p>Determining bursary and scholarship eligibility. Conducting OSAP file reviews and appeals – ie. Family break down, credit appeals. Completing Emergency Loan approvals, Determining Academic OSAP Restrictions Back dating an OSAP withdrawal due to non-attendance resulting in a student overpayment and ineligibility for funding.</p>	Forwarding a student OSAP file to the ministry for investigation ie. Suspicion of fraud.

## 7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M. I)*
How is it received?	How is it carried out?		
Contact is made in person, by phone, e-mail or fax. – inquiries are handled by the incumbent	The incumbent must ask clarifying questions to develop a thorough understanding of the request to determine how to best proceed. Service is often tailored to meet the specific needs of a student's particular circumstances. Some inquiries are straight forward with an established process.	Student, faculty, other College staff, counselors and general public	D

<p>Contact is made via email or via phone inquiry – inquiries are handled by the incumbent</p>	<p>Calls and email are handled by case load structure; all inquiries must be handled by the incumbent in this situation. Incumbent must ask relevant questions to determine the nature of the problem and ensure that proper F.O.I protocol is followed. Incumbent will investigate through use of Evolve System - Records, Admissions, Cashier, OSAP, AS400 to interpret and analyze the information as it relates to Financial Aid. Procedure manual and past practice can provide assistance.</p>	<p>Student, faculty, other College staff, counselors and general public, Children's Aid Society, Ontario Works, MP Office, Ontario Disability Support office, National Student Loan Service Centre.</p>	<p>D</p>
<p>Request from outside agencies regarding specific OSAP information or confirmation of student status made in person, by phone, mail, fax or e-mail.</p>	<p>The incumbent ensures all requests are carried out according to the Freedom of Information, and Protection and Privacy Act prior to release of documentation or information by mail, fax, e-mail or in person.</p>	<p>Outside agencies and Government Organizations</p>	<p>W</p>
<p>Incumbent will analyze students' application data to ensure OSAP application accuracy and identify opportunities for maximum funding for student.</p>	<p>The incumbent downloads, filters and sorts the OSAP YTD file (157 data fields which are updated on a daily basis by the Ministry), to extract information looking for anomalies and omissions on the student application and comparing numerous data fields. The incumbent will then reach out to the student by phone, e-mail or in person. This ensures correct funding and accurate files.</p>	<p>Student, parent and other staff.</p>	<p>D</p>

\* D = Daily W = Weekly M = Monthly I = Infrequently

## 8 Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M, I)*
Exchanging routine information, extending common courtesy	Clarification and review of OSAP policies, confirmation of program status provision of fee information either through telephone, e- mail or personal communication.	Students, faculty, parents, college staff, high school guidance counsellors, general public	D
Explanation and interpretation of information or ideas	. By phone, e-mail, in person or through third party inquiry the incumbent provides coaching and guidance for students and parents completing the OSAP on-line application including how to access the application on-line, navigation through the screens and pages; generation of signature pages, required supporting documentation and OSAP assessment summaries. Provides clarity by interpreting and explaining OSAP policy and procedure. Incumbent is required to determine the level of comprehension and gear the explanation to the audience using layman's terms and user-friendly language, as OSAP concepts are most often outside of the student or parent knowledge base  Incumbent must explain on-line Fleming Bursary application process and screens	Students, parents, program co-ordinators, counsellors, high school guidance counsellors, staff, general public and Government agencies	D
Imparting technical information and advice	Provides clarity by interpreting and explaining full time and part time OSAP policy and procedure. Incumbent needs to explain details by interpreting policy in such a way that it is fully understood by others. In doing so, the incumbent has to assess the audience and gear their communication style to fit the circumstance.	Students, Staff, parents, program co-ordinators, counsellors, high school guidance counsellors, staff, general public and Government agencies	D

Instructing or training	Develops and delivers workshops to educate students, parents, and outside agencies on how to create a budget and manage OSAP student loan funding during the academic year. Creates and organizes workshop resources such as, presentation slides, brochures, and handouts.	students, parents, and outside agencies	M
Obtaining cooperation or consent			
Negotiating			

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## 9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting at desk and computer	D			X	X		
Lifting, moving, shifting, bending to get files	D	X			X		
Lifting full file boxes	I	X			X		
Standing, walking, climbing stairs	D	X			X		
Standing for long periods of time (Open House, CIP tours, Welcome Days)	I			X		X	

\* D = Daily W = Weekly M = Monthly I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

- Light (up to 5 kg or 11 lbs)
- Medium (between 5 to 20 kg or 11 to 44 lbs)
- Heavy (over 20 kg or 44 lbs)

Files and supplies
Full file boxes

## 10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Ex tended > 2 hrs
OSAP Cost Code Updating. The FAO must link cost codes for each semester if a program has multiple semesters (2,4,5) they have to update each cost code for each semester to link them in the ministry system	<b>D</b> <b>6 to 8 weeks during peak periods for fall, winter, spring semester</b>			<b>X</b>
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input checked="" type="checkbox"/> No --- The development of the cost codes and the structure is very detailed and complex. It requires extended periods of time to complete. The incumbent is often interrupted due to student and staff inquiries such that their attention is required to refocus on the most immediate need – primary contact for appeals and reviews				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Ex tended > 2 hrs
<b>Disability Tuition Program. The FAO must review the request, verify request meets ministry guidelines, review all supporting documents, pull previous files.</b>	<b>W</b>		<b>X</b>	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input checked="" type="checkbox"/> No – Incumbent is often interrupted while completing tasks of this nature – primary contact for appeals and reviews.				

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Ex tended > 2 hrs
<b>Completing OSAP file appeals</b>	<b>D</b> Daily -6 to 8 weeks peak periods for fall, winter & spring		<b>X</b>	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

Usually

X No – During peak processing periods the incumbent is required to process OSAP appeal files. The incumbent is often interrupted due to student or staff inquiries such that their attention is required to refocus on the most immediate need of the student or staff member making the inquiry.

\* D = Daily W = Weekly M = Monthly I = Infrequently

## 11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D, W, M, I)*
X acceptable working conditions (minimal exposure to the conditions listed below)	Office environment	D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
X dealing with abusive people	The incumbent experiences frustrated students or family members who use derogatory or threatening language. This occurs more frequently during peak times when the student is informed that OSAP funding has been reassessed or denied, or a bursary decision has not been made in their favour. This can be by phone, in person, e-mail or social media.	M
X dealing with abusive people who pose a threat of physical harm	Students who become extremely agitated and frustrated may physically move into the incumbent's 'comfort zone', either with physical gestures or by verbally threatening physical harm	I
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
X Travel	Required to travel to high schools for OSAP presentations	I

\* D = Daily    M = Monthly    W = Weekly    I = Infrequently