

POSITION DESCRIPTION FORM (PDF)

Regular Part-time Support Staff

Position Title: Customer Service Advisor

Position Number: PT0132

Pay Band: 08

Reports To: Shelley Rowan

Appointment Type: 12 Months

“Other” Hours Details: 24

Scheduled Weekly Hours (maximum 24 hours per week): 24

PDF Completed By (Manager Name): Shelley Rowan

Effective Date: Immediate **Last Revision:** [Click here to enter text.](#)

SIGNATURES

Incumbent: _____ **Date:** _____

(indicates incumbent has read and understood the Position Description Form details)

Supervisor: _____ **Date:** _____

(indicates the supervisor has authorized and assigned the duties & responsibilities in the PDF)

NOTE: Please return the original PDF to HR Operations (Michelle Bozec) as soon as it has been signed. Thank you.

PART ONE:

POSITION SUMMARY

Summarize the overall purpose of the position and why it is necessary within the organization. The summary should be a concise description (rarely more than two or three sentences) of the total position and should include only the most significant aspects of why the position exists in terms of its goal and objectives and its purpose in the College.

This position is needed to support the front counter services provided at the Frost campus. With the growing demands of back office processing it is becoming increasingly difficult to provide adequate coverage for the front counter. Vacations and sickness has required staff to be reallocated from Sutherland to the Frost campus. To accommodate start up it has been necessary to hire part-time casual staff for a minimum of 16 weeks.

PART ONE: *(continued)*

KEY DUTIES & RESPONSIBILITIES

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Keep sentences short, simple and to the point. *TIP: Describe major clusters of functional work rather than detailed individual work routines and procedures.* Do not use allocations of less than 5%.

	Summary Details	Percentage %
1	<p>Student Registration: Registers full-time and part-time students and ensures that all necessary processes and documentation has occurred. Verifies that all proper requirements for admission have been met, assists students with course loadings and the development of their overall course schedule, provides direction with respect to exemptions, transfers and withdrawals and completes student i.d. cards. Assists with other office duties including mail delivery and distribution, filing and other duties as needed.</p> <p>Provides a first level advisory function to students by assisting them in making course choices, interpreting academic regulations, College and Ministry policies i.e. OCAS, OSAP, Tuition fees, Admissions policies etc., Incumbent offers guidance to students with respect to refunds, financial aid, admissions etc. and refers to functional specialists (Admissions/Records/Financial Aid) when appropriate to ensure the inquiries are handled effectively and accurately</p> <p>Responds in person, or electronically to inquiries from students and the College community and general public, regarding the College, its programs and services; registration and record keeping policies and procedures; and the interpretation of Academic Regulations, Students Rights and Responsibilities etc</p>	60%
	<p>Financial Aide Assistance: Provides first point of contact for students, handling general level inquiries related to OSAP applications, entering key</p>	10%

3	information and reviewing supporting documentation for completion before forwarding to Financial Aid Officer for processing. Provides Financial Aid Officer with general information related to assessments, outstanding items in the application, academic and/or other restrictions on file. Handles general inquiries regarding bursary application process and provides students with assistance in ensuring application is complete and troubleshooting first level inquiries regarding applications not approved to be submitted Cashier Services: One of the primary contacts for cashiering services for Frost Campus including accepting fee payments. Communicates with Corporate Cashier Services on any anomalies regarding student accounts for required adjustments.	
5	Records Maintenance & Assistance: Processes most Transcript and Confirmation of Enrolment requests. Prepares letters in response to legal inquiries. Operates photo id equipment and monitors supplies. In peak periods the incumbent will assist other areas of the office. Validates that for each student, that their hard and soft copy records and financial information is accurate and complete. Assists in maintaining the integrity/accuracy of student data, by abiding by the protocols/procedures of reporting/changing student records/financial assistance information	10%
4	Records Phone and Email: Answers Records phone and email messages.	15%
6	Other Duties As Assigned <i>(do not amend this section)</i>	5%

To calculate the relative percentage of time allocated to each cluster of key duties & responsibilities, remember to consider the total amount of hours this part-time position will normally work in a year.

For example:

An RPT position which normally works 24 hours per week for 10 months of the year would have approximately 960 annual hours (24 hrs/wk x 4 wks/month x 10 months). If this position is estimated to spend 5 hours per week completing a cluster of work associated with organizing and maintaining business files, you would allocate 20% to this function calculated as (5 hrs/wk x 4 wks/month x 10 months) divided by 960.

PART TWO:

TRAINING & TECHNICAL SKILLS

Indicate the minimum level of independent studies, formal education, internal and/or external training programs including professional and technical or apprenticeship courses necessary to fulfill the requirements of this position.

Formal Education Requirements:

Completion of a two (2) year college diploma.

Field(s) of Study:

Business Administration

Other Vocational Certifications and/or Apprenticeships:

Click here to enter text.

EXPERIENCE

Specify the minimum number of months and/or years of practical experience in any related work necessary to fulfill the requirements of this position.

Practical Work Experience:

More than one year up to three years.

Additional Skills & Abilities:

Experience working independently in a front line, customer service, deadline driven, self-directed team environment prioritizing, organizing and problem solving own work

Experience using computer application skills, including a large business system and various software applications ie. E-mail, word processing, spreadsheets, internet and Enterprise Resource Planning systems.

Experience dealing with sensitive and confidential information and the F.O.I. Act. Demonstrated skills effectively interacting with students from varying social, academic, economic and cultural backgrounds.

Demonstrated documentation and verification skills as they relate to records management, various financial assistance applications and loan documents

PART THREE:

COMPLEXITY

Describe the amount and **nature of analysis, problem-solving and reasoning** required to perform the core duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position. Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity A student is in their final semester and requires specific courses within their course load to meet diploma requirements.
Description: The incumbent will have to determine which courses are available for required programs and identify whether the course can be scheduled without timetable conflicts. Confirmation of course requirements to satisfy diploma completion is required as well as verification of any prerequisite standards.

Clarification of diploma needs as understood by the student may have to be verified through review of their academic history to ensure they are making the correct selection. A review of the scheduled course blocks will provide details of courses available for the program. There may be circumstances where a Chair approval schedule over-ride will have to be employed to allow courses which are in conflict to be scheduled.

Example #2

<p>Task / Activity Processing tuition payments for all new and returning, students for Frost Campus.</p>
<p>Description Incumbent must determine if student is new or returning, if payment is on time or late and what payment option student is selecting along with payment eligibility and admission status. Prior to processing payment each student’s account must be reviewed to determine what payment options are available to the student. Confirmation of the student’s admission/registration status must be determined before payment can be processed. Once the above has been confirmed, then the proper payment process must be initiated; cash, debit, credit card,</p>

Key Considerations:

With respect to the examples above and the regular duties associated with this position’s core functions, please answer the following questions:

Is the work considered to be routine/non-routine?
Non-routine.

Comment: Transactions usually differ depending on student circumstances

How would you describe the complexity of the work?
Some duties are varied and complex.

Comment: On occasion, if not FT CSA available, incumbent would need to deal with complex situations independently.

Describe the business processes used by the position.
Choose an item.
Comment: Process are different but related

JUDGMENT

Describe the degree of independent judgment and problem-solving required to perform the duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position. Answer the questions listed below in the Key Considerations section.

Example #1

<p>Task / Activity Student wishes to transfer to another program.</p>
<p>Description</p>

A student has attended a week of classes and has decided that a different program would be more appropriate. They make an inquiry in the Registrar's Office.
Incumbent will have to get further details about the program that the student wishes to transfer to. Does the student meet the admission requirements; is there still space in the program; are there still spaces in the program courses; are there tuition differences.
Through discussion with the student, the incumbent determines the nature of the request for program change. Key differences fees are explained to the student to make an informed choice before initiating transfer process (tuition/fee differences, program duration, The incumbent will advise the student if the intended program is full or the incumbent will fill out the necessary paperwork and submit to Admissions for evaluation). If there are core and elective course choices required as part of the new program choice, the incumbent guides the student through the selection process".

Example #2

Task / Activity
Description

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

The work duties typically require:
Some choice of action within established limits.

In determining a solution for problems, the incumbent has discretion to:
Choose from a range of existing options.

MOTOR SKILLS

Describe the aspects of the position that require fine motor movements (delicate, intricate or precise) related to the core duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity Typing/Mousing
Description It is necessary for this position to sit at a desk and type on a keyboard and use a mouse.

Example #2

Key Considerations:

With respect to the examples above and the regular duties associated with this position’s core functions, please answer the following questions:

When considering ‘speed’ of fine motor movements for this position:

Speed is not a consideration.

Indicate the percentage of time that is required in performing each of the tasks discussed above.

Task	% of Time
Typing/Mousing	95

PHYSICAL DEMAND

Describe the degree of **physical demand** required to perform the duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position that illustrate the type and duration of physical effort, the frequency, the strain from rapid and repetitive fine muscle movements or the use of larger muscle groups, lack of flexibility of movement, etc.

Example #1

Task / Activity Front Counter Service
Description This position usually sits at a desk but it is necessary to lift, move or shift files and supplies..

Example #2

Indicate the percentage of time that is required in performing each of the tasks discussed above.

Task	% of Time
Typing/Mousing	95%

SENSORY DEMAND

Describe the degree of **sensory demand** required to perform the duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position that illustrate the level/degree of concentration (visual, auditory, tactile, etc.). Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity Front Counter Service
Description Complexities involved with processing course registration, financial aid, and cashiering transactions.

Example #2

Task / Activity

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

How would you describe the requirement for attention to detail in this position?

Frequent/Regular

Indicate the percentage of time that is required in performing each of the tasks discussed above.

Task	% of Time
Front Counter Service	100%

STRAIN FROM WORK PRESSURES / DEMANDS / DEADLINES

Describe the degree of **work pressures** involved in performing the duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position that illustrate the deadlines, interruptions, distractions, multiple or conflicting demands/workloads and dealing with people in difficult situations. Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity Front line service.
Description Work done by incumbent is time sensitive as students require immediate rectification of presented issues. On occasion the incumbent may experience irate customers who use derogatory or foul language.

Example #2

Task / Activity
Description

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

How would you describe the workflow demands this position typically faces?
 Deadlines regularly are tight AND periodically change.

How would you describe the existence of critical deadlines in this role?
 Frequent critical deadlines.

How would you describe the level of interruptions this position faces?
 Interruptions are frequent and may be unpredictable.

Indicate the predictability of the strain and percentage of time required in each task discussed above.

Task	% of Time	Predictability*
Front Line Service	5	NP (Not Predictable)
		Choose an item.

INDEPENDENT ACTION

Describe the degree of **independent action** and **autonomy** required to perform the core duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position. Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity Front Line Customer Service
Description When providing options to students whether it be with respect to financial aid, course selection, timetables, interpretation of college policy/guidelines, incumbent is required to ensure that students/college staff/external community are directed appropriately. 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 on a daily basis. .

Example #2

Task / Activity
Description

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

What type of instruction is typically given to the incumbent?
 Works within established operational practices.

What degree of supervision is typically provided to the incumbent?

Periodic supervision; occasional supervisory input.

How is the work typically checked and verified?

Output is reviewed by exception only.

How frequently is the work checked?

Reviewed upon project completion only.

Describe duties which are the incumbent’s responsibility where independent action requires initiative and/or creativity and indicate how often the duties occur.

Identify the typical situations or problems that are normally referred to the Manager for solution.

Consideration for approval of actions which fall outside the academic schedule such as late registration.

Matters requiring a change in policy/procedures or problems/issues not encountered before.
Irate and/or upset students, parents, faculty or public who will not accept policies and procedures.

Situations which involve controversial issues where M.P., lawyer, parent or community agency are involved.

Freedom of Information inquiries from police and private investigators.

COMMUNICATIONS / CONTACTS

Describe the nature of contact and purpose involved in communicating information (i.e. to provide advice, explanation, to negotiate, or influence others to reach agreement, etc.), and the confidentiality of the information provided. Answer the questions listed below in the Key Considerations section.

Nature of Contact (Who)	Purpose of Contact (What)	Frequency
Students	Course selection, Financial Assistance - loan disbursement, C of E processing, bursary applications, Timetabling	Daily
Co-workers	To provide background information, referring a student	Daily
Faculty/Coordinators:	Information sharing related to: Student registration, admissions information, academic advising issues, waitlists Information regarding student status; processing questions	Weekly
Accounting office:	Clarification regarding: Student accounts, fees, OSAP deferral options.	Infrequently

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

Communications in this position are typically engaged for:
Providing explanation or interpretation, empathize with the needs of others.

What type of involvement does this position have with confidential information?
Regular involvement; disclosure implications could include adverse publicity or litigation.

RESPONSIBILITY FOR DECISIONS AND ACTIONS

Describe the type of **responsibility** that exists for the **decisions** and **actions** related to the core duties of the position. Provide up to two (2) examples in the space provided below of regular duties for this position. Answer the questions listed below in the Key Considerations section.

Example #1

Task / Activity Front Line customer service
Description Incumbent is accountable for ensuring work is completed accurately and on time in accordance with policies and procedures of college and Ministry requirements. Creativity is required in identifying alternate solutions. Flexibility is given as long as the incumbent remains within the bounds of established standards, agreements, and policies i.e. waiving deadline dates, refund policies etc

Example #2

Task / Activity
Description

Key Considerations:

With respect to the examples above and the regular duties associated with this position's core functions, please answer the following questions:

How are errors typically detected for work completed by this position?
Errors detected after-the-fact.

What is the typical scope of impact to the organization for errors in this position?
Results in minor embarrassment, confusion or expense.

WORK ENVIRONMENT

Describe the physical environment that the incumbent works in. Consideration should be given to:

- The probability or likelihood of exposure to disagreeable/hazardous elements.
- The nature of the disagreeable/hazardous element

- Length of exposure while on the job
- Travel

Complete the chart below. Answer the questions in the Key Considerations section.

Environment	% of Time
Professional office environment Yes	95%
Outdoor work; seasonal conditions No	
Other (please specify) Convocation	5%
Other (please specify)	

Key Considerations:

With respect to the nature of disagreeable/hazardous elements this position is in contact with, would you describe them as:

Slightly disagreeable

With regard to the disagreeable/hazardous elements referenced above, how often does the position encounter them?

Occasional

If this position is required to engage in business related travel, what is the frequency of the travel?

Choose an item.

Drop down does not have a value for No

SUPPLEMENTAL DATA

Provide any additional information which will serve to further enhance understanding of the position.

[Click here to enter text.](#)