# Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name:

Position Title:  Records Specialist                          Payband:  G

Position Code/Number (if applicable): S00226

Scheduled No. of Hours_____35_____

Appointment Type:  _____X_____12 months  _____less than 12 months

Supervisor's Name and Title: Jeff Macnab, Manager, Records

Completed by:  Shelley Rowan

PDF Date:  02-January-2017
**Last Revision: 07 Oct 2017**
**JEC Review: October 2017**

**Signatures:**

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

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 fo 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.

Provides pro-active coordination, related to the registration of all full and part-time students (day, evening, post secondary and non post secondary) including implementation and maintenance of all Records processes and systems. Processes and manages documentation for each student from Registration to Graduation.

Provides for the accurate maintenance of the active and historical student records system. Monitors processes which impact the integrity of the student information system especially within the schools responsible for. As Specialist for the School, provides overall coordination, documentation and process recommendations for all related records processes.

Provides detailed verbal and written communication directly to students and the college community that reflects the department objectives to provide excellent and timely service. Advises students regarding wide variety of information concerning the College, its policies/procedures, programs and services.

Provides support to Convocation Coordinator in assigned areas for the coordination of annual Convocation process (ex. gowning, marshalling, program development, seating, etc.)

Preparation of student records to ensure a seamless graduation audit process.

## 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* |
|---|---|
| **Student Registration** <br><br> The incumbent provides registration of Part-time and Full time (day and evening) students by processing all documentation relevant to student records, i.e. course registration, student timetables, exemptions, personal information changes, transfers and withdrawals. <br><br> The incumbent must ensure that consistent practice and procedures are used when maintaining student records through process schedules and documented procedures | 25 |
| **Start of semester processing** <br> Prepares for the registration of post-secondary students. Assess student records/files to ensure that the students have moved accurately into the upcoming term. Builds initial student timetable for all students in the school. Advise students who have changed status. Liaise with program coordinators, Chairs and Deans to ensure maximum capacities for program enrolment. Monitors and controls student intake to ensure enrolment targets are met without exceeding class limits. Identifies problems and takes corrective action to ensure students are enrolled in the correct classes. | 20 |
| **System Maintenance** <br> Assists with system maintenance as it pertains to keeping the data within the Enterprise Resource Planning System clean and accurate. Run queries, extracts and reports from time to time as required by the business process cycle ie Term Activation process.. Liaise with the RO systems staff about Records system processes and or system projects from time to time. This includes assisting in the testing portion of the annual Bundles and Patches upgrades. The incumbent must be continually assessing changes within the system and the impacts to processes and data reports that they manage.. Makes decisions on student FT or PT status for enrolment purposes based on data extracted from the system. Continuous identification of system changes that affect Records processes. Analyze and update processes on a regular basis. | 10 |
| **Communication** <br><br> Communicates directly with Co-ordinators/Chairs and Deans regarding anomalies, problems, changes, etc. The incumbent provides an advisory role to students, the college community, and the public, in person, by phone, via e-mail, and by regular mail on Fleming College programs and services; registration and record keeping policies and procedures; and basic information regarding Financial Aid, Student Accounts, Academic Regulations, , Academic Schedule etc. Assists in the updating & distribution Records communications to students and the college community. | 10 |

| | |
|---|---|
| **Graduation/Convocation**<br>For several weeks at the end of each semester, three times per year, the incumbent must coordinate Graduate Audit process for their academic school. The incumbent must collect, extract and analyze data from the Academic Advising system to ensure that the school coordinators get complete and accurate audits to review. Liaise with program coordinators on any student issues that may prevent graduation.<br><br>Provides support to Convocation Coordinator in assigned areas for the coordination of annual Convocation process (ex. gowning, marshalling, program development, decorations, seating, etc.) At Convocation in assigned areas, delegate tasks to volunteers & ensure carried out appropriately.<br>. | 10 |
| **End of Term processing:**<br>Academic probation procedure: Analyses probation queries and withdraws students from the upcoming term according to minimum grade requirements based on GPA Manually reviews other grade reports for mandatory courses which have not been passed, changes student status to probationary, and drops students from upcoming courses if pre-requisite requirement is not satisfied. Determines anomalies and contacts Co-ordinator when required (ex. all students in one program on probation).<br>Clean up of physical graduate and withdrawal files and prepareation of information for storage.<br>Assists in the processing of requests for transcripts, enrollment confirmation and course outlines as requested by Front Counter. | 20 |
| Other related duties as assigned | 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          X   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

    Field(s) of Study:
    Business

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.

| | |
|---|---|
| X   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 | . |
| x   Minimum of three (3) years | Experience working independently in a front line, customer service, deadline driven, self-directed team environment prioritizing, organizing and problem solving own work.<br><br>Strong communication skills (written and verbal) with the ability to effectively Convey complicated policies and procedures in a manner which others can clearly understand. |

Experience using computer applications for records reporting and data analysis. Knowledge of various office software applications ie. E-mail, word processing, and spreadsheets.

Experience dealing with sensitive and confidential information, the F.O.I. Act.

Demonstrated customer service excellence and the ability to interact effectively with students from varying social, academic, economic and cultural backgrounds with empathy and tact.

Demonstrated documentation and verification skills as they relate to various applications, reports and college documents

Analytical and creative problem solving skills resolving a range of issues of varying complexity on a daily basis to develop and recommend creative solutions to address student needs.

Ability to effectively respond accurately on the spot to student, faculty and publics concerns.

☐ 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. | Unusual student circumstances such as family, financial or medical that impact a student continuing within the current semester/program |
| How is it identified? | The issue is identified by the incumbent during communication with the student or faculty member and review of the student account and record. |
| Is further investigation required to define the situation and/or problem? If so, describe. | Through in-person interviews, telephone conversations and e-mail with the student (and parents/partners/), the incumbent exercises a significant level of judgment, sensitivity, compassion and understanding of the student's and family members' personal situations with a high level of comfort in the environment and trust the incumbent creates. The incumbent uses past practices and extensive knowledge of College and procedures including interpretation of the academic regulations and withdrawal, refund policies. Further communication may be required to gather supporting documents for the incumbent to review and determine a course of action. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | The incumbent must carefully assess all options available to the student by review of the request in writing, supporting documentation and personal information.. Creative problem solving by the incumbent is integral to the efficient processing of the issue while considering the uniqueness of each student's personal situation in order to identify and resolve potential/real problems related to unusual applicant or student circumstances. The incumbent must work closely with the academic staff including faculty, program coordinator, Chair or Dean to interpret the academic regulations and collect any further information i.e. attendance records etc that allows the incumbent to get a full picture of the scope of the issue. Students, who are experiencing crises, look to the incumbent for a solution to their problems. The incumbent is required to ask probing and often sensitive questions while maintaining student's dignity. |

| | |
|---|---|
| | Situations outside of normal parameters involving refunds, or retroactive withdrawls are referred to the Manager of Records. |
| What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines). | Academic Regulations |
| | System processes |
| | Documentation sourced within the academic School i.e. mid term marks, attendance records, assignment collection |
| | College Policies and Procedures |
| | Web CT |
| | Past Practice and experience working with students in crises and team member support as needed |
| | Special circumstances maynot have a solution engrained within College policies and procedures are referred to the Manager. |

## 3. Analysis and Problem Solving

### #2 regular & recurring

| | |
|---|---|
| Key issue or problem encountered | Finance Dept has identified a potential list of students that have outstanding accounts and need to be confirmed prior to being sent to collections. The incumbent validates the student record with respect to student status & fees associated with course enrollments and withdrawls. |
| How is it identified? | Students with outstanding accounts have been sent multiple statements of account. They are extracted from the system based on queries. |
| Is further investigation required to define the situation and/or problem? If so, describe. | The incumbent must identify through investigation and knowledge of the system, academic regulations and college policies around refunds and withdrawals that these students have amounts owing. Advising the financial staff around particular students and any exceptional circumstances. The incumbent must use analytical skills to investigate each student record. Exceptional payment plans may have been identified or other circumstance that would preclude these students from going to collections. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | The incumbent must review the student record and all transactions to determine the validity of the charges. Contributing factors such as Level load issues, , Double fees charges, student status  exceptional circumstances  This will require them to check in various areas within the student information system  such as program of studies, records and enrolment, term activations, along with college policies and regulations, the incumbent must narrow down the scope of the problem, identify the specific amount owing and decide whether the fees are accurate. |
| What sources are available to assist the incumbent finding solution(s)?  (eg. past practices, established standards or guidelines). | Student Information System<br><br>Cashiers and Payment Procedures<br><br>College Regulations. Policies and Procedures<br><br>Systems Analyst for RO<br><br>Best practices<br><br>Consultation with Co-workers. |

| Key issue or problem encountered | .Student will not graduate |
|---|---|
| How is it identified? | Graduate Audit Process. |
| Is further investigation required to define the situation and/or problem? If so, describe. | The incumbent is required to review the student's record, program start term, program curriculum, and course enrolments to determine why the student is missing a program requirement. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | The incumbent must review all records that pertain to the student including admissions information. Then they must determine what term the student started in and how the course deficiency was created. It may be necessary to contact the coordinator to ask for possible substitutions or exceptions. dropped a course or curriculum changed etc. |
| What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines). | Student Record, Program of Study, Advisement Reports, coordinators. |

3. **Analysis and Problem Solving**

| Key issue or problem encountered | At a cross functional meeting an issue is identified which points to a series of errors within the progression of student records. There are several students who have not progressed to the correct level/semester in their program |
|---|---|
| How is it identified? | May be identified from several areas – from students, faculty or Academic Area. |
| Is further investigation required to define the situation and/or problem? If so, describe. | Discussions with RO systems staff and others (student, faculty or APO) further identify that students are not in the proper level of their program. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | The incumbent will run the Program Load Exception report which identifies students in error. The incumbent must then begin the process of analysing what caused the error and what the correction is. This includes looking at the program plan, program of studies, level load rules, term activation records, any overrides on the student record, whether the student was given advanced standing or direct entry, have any transfer credits/exemptions been keyed etc. There are multiple areas within the Student Information System to look at. Corrections must be made and further queries run to ensure that all errors have been corrected. |
| What sources are available to assist the incumbent finding solution(s)? (eg. past | Student Information System<br><br>Technical Business Analyst |

| practices, established standards or guidelines). | Best practices |
| | Co-workers. |
| | Cross functional areas – Student Financials, Academic Planning |

**#2 occasional** (if none, please strike out this section)

| Key issue or problem encountered | A student attends the Registrar's Office front counter, distraught or furious over a disagreement regarding their timetable or fees. |
| How is it identified? | Student will be crying or yelling when they come into the office. Parents may attend with or without students and demand information which incumbent is unable to give due to FOI. . |
| Is further investigation required to define the situation and/or problem?  If so, describe. | The first priority is for the incumbent to make an initial attempt to calm the student / parent using interpersonal and communication skills to ensure the individual knows they are heard and that the issue is being taken seriously If the behaviour continues, the incumbent is to call a manager. If they perceive a threat to their safety, they are to immediately contact Security.<br><br>If relevant, the incumbent must explain F.O.I. policy to parents if the student is not present.  The incumbent can suggest that the parent have the student contact the R.O. to complete an authorization form. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | The incumbent must first get a full and complete picture of the situation.  It is necessary to analyse the student record from all aspects – admissions, records and associated fees. This is usually difficult because the student is upset and wanting answers. The incumbent must explain college policy and practice related to the issue.  The academic regulation will address most issues but if the student did not complete her obligation – ie appeal of a failing mark – there is little that can be done. Discussions with the program coordinator will address whether an educational plan can be set up to accommodate the missed courses. It may be necessary for the incumbent to connect with student services for counselling services and other educational assistance. Problem solving skills are essential and critical to ensure a successful outcome of these situations. |
| What sources are available to assist the incumbent finding solution(s)?  (eg. past practices, established standards or guidelines). | Dean, Chair, Program Coordinator |
| | Past practice. |
| | Academic Regulations |
| | Manager of Records |

| | |
|---|---|
| Director of Student Services | |
| Manager of Safety and Security | |
| Co-workers. | |
| Cross functional areas – Student Services, Counselling, Cashiers, Financial Aid. | |

## 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:

### #1 regular & recurring

| | |
|---|---|
| List the project and the role of the incumbent in this activity. | End of Semester Planning.<br><br>The incumbent is responsible for maintaining the accuracy of information within their own portfolio of students. They plan when their end of semester activities depending on the requirements for each semester. (ex. graduate status, work/study letters, batch transcripts, etc)<br><br>Planning own work for Academic Standing reports along with Grade roster interaction with Faculty to comply with Academic Schedule. There is a small window of time to plan for and coordinate many tasks between one semester end and the next semester start up. |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Time Management, self discipline and attention to detail are essential. Planning skills to prioritize and complete tasks to meet the deadlines around last day of semester and communicate with the appropriate areas are required. |

| List the types of resources required to complete this task, project or activity. | <ul><li>Evolve,</li><li>Knowledge of Fleming college programs,</li><li>Academic regulations</li><li>College policies and procedures as they relate to the student.</li><li>past practice and knowledge of best practices.</li><li>Interaction with the academic schools</li></ul> It is not uncommon for procedures to changes mid-academic year as new projects are rolled out that affect the student record This will require an immediate change to procedures and decision making. |
|---|---|
| How is/are deadline(s) determined? | Academic Regulations and Academic Schedule and Fleming College deadlines (tuition payment deadline, start up dates) predetermine semester start and end dates – these are not flexible. |
| 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. | System issues may change the priority of processes and the Technical Business Analyst or Manager will determine if deadlines need to be adjusted. If academic deadlines are changed ie collection of final marks, there is a cascade affect with will impact the deadlines of project completion.<br><br>Incumbent must plan their own timelines around College closure dates. |

## #2 regular & recurring

| List the project and the role of the incumbent in this activity. | Graduation Audit.<br><br>The incumbent is responsible for managing and organizing a successful graduate audit process following each semester. The incumbent is responsible for ensuring that each Program Coordinator receives an accurate Preliminary Graduate audit for each student within their school. The incumbent must ensure that the audits are collected and analyzed carefully by the deadline given, interacting with the coordinators to work towards accuracy and completeness. This will include some training/assistance to the new program co-ordinators as they become familiar with our Academic Advising module and are taught how to view/read and analyse the student audit. |
|---|---|
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | The incumbent must organize the diploma audit processing for the program areas they are responsible for. The timelines for this process can be variable depending on the curriculum delivery. The incumbent must be aware of when marks are in for their students |

| | and process the necessary audits. Lists of complete and incomplete students are compiled, verified, and revised until the deadline is reached. The incumbent must work with the Coordinators to review the accuracy of the audits and determine solutions for students with incomplete diploma requirements. The incumbent must also take convocation timelines into consideration when planning their processing timelines.. Any errors or omissions can result in students not graduating within the current academic year. The incumbent must manage the exceptional student files that require manual intervention. |
|---|---|
| List the types of resources required to complete this task, project or activity. | People soft Evolve System<br><br>Academic Coordinators and Deans<br><br>Academic Regulations and College policies especially around the conferring of Diplomas and certificates<br><br>R.O. Technical Business Analyst<br><br>Best and past practice – Consulting with team members. |
| How is/are deadline(s) determined? | The grad audit is planned through the Academic Planning cycle. The Records team in collaboration with the academic schools can adjust this to a small extent |
| 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. | Collectively the Records team can determine changes to the project/activity which can impact the student and college community. Extensions of returning the audits to the Records office is sometimes necessary to accommodate a large group of students or a curriculum issue that has not been resolved. The incumbent will work with their academic school to determine next steps.<br><br>For instance the School of Business received a large number of audits as the Field Placements were floating and not attached to the program of studies. The impact on the coordinators was significant. This meant that the grad audits were not returned with the other audits. The management of these grad audits are critical to be completed within the time frame for convocation. The coordinators must work closely with the incumbent to ensure that each student is registered within a field placement course at the end of their last semester. The incumbent along with the Technical Business Analyst, Academic Operations, Chair and Records manager will work to resolve this problem in future audits/semesters. |

| | #3 regular & recurring |
|---|---|
| ~~List the project and the role of the incumbent in this activity.~~ | |
| ~~What are the organizational and/or project management skills needed to bring together and integrate this activity?~~ | |
| ~~List the types of resources required to complete this task, project or activity.~~ | |
| ~~How is/are deadline(s) determined?~~ | |
| ~~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.~~ | |

## #1 Occasional

| | |
|---|---|
| List the project and the role of the incumbent in this activity. | Convocation overseeing roles within the event planning, both and during convocation. While there is a convocation co-ordinator, each records specialist is given a specific role to oversee other college staff within their area of oversight on the day of convocation. This may be the gowning room, stage maintenance, marshalling, set up and take down, welcoming students and family to and monitoring the reception etc. This is done o for up to 11 convocations at 3 different venues/campuses |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Planning & coordination to ensure assigned activities (ex hood orders, flower orders, gowning, marshalling, etc) are done in a timely manner.<br><br>On convocation day, motivational skills are used to keep staff upbeat and focussed during an extremely busy time – for example - when upwards of 250 students may be attending the room to be gowned within a short period of time, or be de-gowned after the ceremony while ensuring that no gowns go missing. Convocation gowns are rented and the college will be charged for any shortages.<br><br>Time Management under pressure is important during this time – ensuring that staff are in place and able to assist students and families during this College Culminating event. |
| List the types of resources required to complete this task, project or activity. | Convocation Coordinator<br>Past Practice |

| | |
|---|---|
| How is/are deadline(s) determined? | Event timelines are determined by Academic Schedule |
| | Event processes are determined by Convocation Coordinator based on past practices and de-brief consultations after previous events. |
| 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. | Convocation Coordinator along with incumbent |
| | There is a very short time frame to accomplish this project.. After each convocation a debrief will be held to assess if changes should be met – this may be because college staff do not show up to help – numbers change, weather changes effect how marshalling will be done for instance, weather will affect how students are marshalled out, how many invitees attend may affect the number of trays of food needed etc. |

## #2 Occasional

| | |
|---|---|
| List the project and the role of the incumbent in this activity. | |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | |
| List the types of resources required to complete this task, project or activity. | |
| How is/are deadline(s) determined? | |
| 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. | |

## 5. 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.

| Regular & Recurring | Occasional | Level | Example |
|---|---|---|---|
| □ | □ | Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students. | |
| x | □ | There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks. | Guide and advise students on making decisions regarding courses, programs, fees and withdrawals. |
| X | □ | The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities. | When questions arise regarding a student records the incumbent will analyze paper, and electronic records plus email communications and recommend a course of action for Records coworkers, financial aid and cashiering. The Incumbent provides a detailed explanation of college policies and recommends solutions to students, faculty and program coordinators . (ex graduate audits, FT/PT status, academic probation, withdrawls, etc.). |
| □ | □ | 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. | |
| □ | 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. | At convocation, in assigned area, delegate tasks to volunteers & ensure that all volunteers carry out delegated duties appropriately within the area of responsibility (ex gowning, marshalling, reception, etc.) |

## 6. 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) |
| General instructions are given through group discussion to determine how new assignments or changes will be handled. Works under minimal supervision and is provided with minimal directional documentation aside from Academic Regulations.<br><br>Incumbent responds to requests from staff i.e. Faculty, Student Advisors, Counsellors, Deans/Chairs, Coordinators/, etc independently within scope of role. Incumbent is expected to search out appropriate information if unknown and work with all stakeholders to determine best course of action | Discussions and general instructions from supervisor or Tech Business Analyst for systems updates and maintenance and occasional reports.<br><br>Incumbent attends Academic School Coordinator meetings to get feed back on current Records processes and offer advise and interpretation of policies and regulations |

| What rules, procedures, past practices or guidelines are available to guide the incumbent? | |
| --- | --- |
| Regular and Recurring | Occasional (if none, please strike out this section) |
| Academic Regulations<br>Academic Schedule<br>Admissions Policies/Procedures<br>OSAP/OCAS Policies/Procedure<br>Past/Established Practices<br>Communicating and meeting with various work groups to ensure that there is agreement and understanding concerning workflow.<br>List Serve Discussion Groups<br>College/External Web Sites<br><br>Above policies are general guidelines and do not provide complete details of work instructions to incumbent – interpretation is required. | |

| How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)? | |
|---|---|
| Regular and Recurring | Occasional (if none, please strike out this section) |
| This is a deadline oriented position. Monitoring is through twice monthly status update meetings and ad-hoc discussions.<br><br>Student complaints will arise if reports and assignments are not on schedule. | Manager monitors progress via reporting during start-up |

| 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) |
| The incumbent must make decisions in consultation with Student and/ or faculty. Students that withdraw after the deadline and fee implications make the decision more challenging. Deans, Coodinators and other staff – Financial Aid, Cashiering and Admissions will consult with Incumbent to reach solutions with respect to course loads, changing status, disability/medical issues and how this affects the students ability to complete their program of study. | |

| 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) |
| Matters requiring a change in policy/procedures or past practice.<br>Issues with students or faculty that cannot be resolved through discussion. | Freedom of Information inquiries from police and private investigators.<br><br>Student withdrawal backdating |

| Describe the type of decisions that would be decided by the incumbent. | |
|---|---|
| Regular and Recurring | Occasional (if none, please strike out this section) |
| Identifies alternate solutions within College policy to meet student needs.. The incumbent must be flexible and open to other options while referring to established standards, agreements, and policies i.e. waiving deadline dates, refund policies etc . | Makes decisions on student FT or PT status for enrolment purposes based on data extracted from the system and knowledge of the individual student's situation. (1 day 3x / yr) |

## 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? | | |
|---|---|---|---|
| Many requests begin with 'How do I …' or 'What are my options if.. Front-line staff; most contact is in-person, | Incumbent will provide a straight-forward explanation based on college and departmental processes. Questions such as 'Why is this happening?' require that the incumbent asks questions of the client to ensure a full understanding of the problem, issue or question. | Students, parents of students, faculty, other support staff | D |
| Questions or requests are usually related to start of term, end of term, or convocation processes. Front-line staff; most contact is in-person, however many inquiries are also sent via email and by phone | Require an in depth knowledge around R.O. processes. More information may be attained by asking pertinent questions of the customer A good explanation will be given taking College policies and procedures in effect. | Academic Co-ordinators, Chairs and deans | W |
| Inquiries received from Accounting – Why does this student owe money? Why is this student account in arrears and why did they change status which is reflected in their fees. | This requires and in depth look at the students record to determine any changes to the account, # of course taken/level load rules, semester level, what fees are associated with this account and the timing of these changes in relation to the academic regulations and college policies. Incumbent must look for oddities in the system data and correct errors if necessary | Accounting Staff, Academic Staff | D |

\*    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 | Inquiries such as student status, whereabouts<br><br>Official transcripts | Parents, police, collection agencies, Employers<br><br>Graduates | D |
| Explanation and interpretation of information or ideas | Course registration, selection withdrawals, marks, exemptions, student files, and general information.<br><br>Attend school and coordinator meetings to present on policy and practice on current challenges<br><br>Transcripts, information collection/sharing, policy/procedure interpretation and changes in guidelines<br><br>Transcript clarification, enrollment confirmation | Students Accounting staff, Academic Staff<br><br><br>Faculty, Coordinators, Counsellors, Advisors<br><br><br>Other educational institutions | D<br><br><br><br>I<br><br><br>I |
| Imparting technical information and advice | Interpret Records policies and procedures. Explain options and provide advice re appropriate course of action. | Students and Coordinators, Chairs | D |
| Instructing or training | | | |
| Obtaining cooperation or consent | | | |
| Negotiating | | | |

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

## 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 keyboard | D | | | X | X | | |
| Lifting/moving/shifting /bending to get files | D | X | | | X | | |
| Walking/climbing stairs | D | X | | | X | | |
| Lifting boxes of historical files to purge as new files take their place | W | | X | | X | | |
| Graduation – Brealey, Frost, Cobourg<br><br>Lifting, Pushing, Pulling/Bending/Climbing/Crouching – Set up of convocation ceremony, Crouching, climbing and lifing to set up and decorate stage, lifign, setup of chairs, loading and unloading vehicles, lifting boxes of programs, diplomas. Carrying large boxes of gowns, standing for extended periods of time | I | | | X | | X | |

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

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

X   Light (up to 5 kg or 11 lbs)

X   Medium (between 5 to 20 kg or 11 to 44 lbs)

☐   Heavy (over 20 kg or 44 lbs)

| Files |
| --- |
| Convocation: loading and unloading vehicles, lifting boxes of programs, diplomas. Carrying large boxes of gowns in addition to work done by Physical Resources |

## 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 | Extended > 2 hrs |
| Grad Audit Process - The incumbent must process between 3-400 individual grad audits for students within a short timeframe. Greater than normal mental concentration is required to ensure that the audits are complete and accurate. The risk of error is significant and would result in a student not graduating | once a semester ( approx. 10 days concentrated effort) | X | | |

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
- ☐ Usually
- X No -. The incumbent is often interrupted due to direct student or faculty inquiries such that their attention is required to refocus on other issues. There is not another area which they can go to work quietly on these tasks.

| Activity #2 | Frequency (D, W, M, I)* | Average Duration | | |
|---|---|---|---|---|
| | | Short < 30 mins | Long up to 2 hrs | Extended > 2 hrs |
| End/Start of Term Processing – Term Activation, Building of Timetables, for each student, Seeking out and entering missing grades, Greater than normal mental concentration is required to ensure that the processes are complete and accurate. The risk of error is significant and would result in a student not receiving a timetable when they should or receiving one when they should not (Academic Probation). When all courses are not on the student timetable and fees, graduation and progression are all at risk. | 3 times per year (approx. 10 days concentrated effort) | Can be as much as 30 minutes per student | | |

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
-    Usually
- x No However, the incumbent is often interrupted due to direct student or faculty inquiries such that their attention is required to refocus on other issues. There is not another area which they can go to work quietly on these tasks.

| ~~Activity #3~~ | ~~Frequency (D, W, M, I)*~~ | ~~Average Duration~~ | | |
|---|---|---|---|---|
| | | ~~Short < 30 mins~~ | ~~Long up to 2 hrs~~ | ~~Extended > 2 hrs~~ |
| | | | | |
| ~~Can concentration or focus be maintained throughout the duration of the activity? If not, why?~~ ☐ ~~Usually~~ ☐ ~~No~~ | | | | |

\*     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 |
| ☐ accessing crawl spaces/confined spaces | | |
| X dealing with abusive people | The incumbent experiences frustrated students/family members who use derogatory or threatening speech. This occurs more frequently during peak times, when students receive statements of account or demand refunds for courses dropped. | M |
| ☐ dealing with abusive people who pose a threat of physical harm | | |
| ☐ difficult weather conditions | | |
| ☐ exposure to extreme weather conditions | | |
| ☐ exposure to very high or low temperatures (e.g. freezers) | | |
| ☐ handling hazardous substances | | |
| ☐ smelly, dirty or noisy environment | | |
| ☐ travel | | |
| ☐ working in isolated or crowded situations | | |
| ☐ other (explain) | | |

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