

Support Staff PDF

**Position Description Form (PDF)**

College: Sir Sandford Fleming

Incumbent's Name:

Position Title: Financial Aid Advisor

Payband: G

Position Code/Number (if applicable): S00668

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

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

Supervisor's Title: Manager, Financial Aid

Completed by: Greg Nelson

PDF Date: March 27, 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
- 1Dated:

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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

The Financial Aid Advisor is responsible for the implementation and monitoring of a variety of bursary, grant, and loan programs, providing excellent customer service and expert advice to students, parents/partners, college staff and other third parties.

The incumbent must stay abreast of relevant OSAP regulations and application processes for a variety of Federal, Provincial and Fleming College financial aid programs as well as external funding opportunities. Responsible for the timely, accurate assessment and processing of OSAP and Fleming College Bursaries.

The Financial Aid Advisor conducts student financial need analysis, provides financial aid counselling, makes professional judgement decisions regarding financial aid eligibility and facilitates problem solving with students, parents and others.

Regularly upload data files, analyses and co-ordinates a variety of data sets such as OSAP YTD file, OSAP student applications, Fleming College Bursary Applications, Financial Aid reports and Evolve Student Centre.

The Financial Aid Advisor prepares and sends outgoing communications using established protocols. The incumbent is also responsible for the maintenance of the Financial Aid webpage ensuring all information is accurate and timely.

The Financial Aid Advisor takes a very active role in the College Open House twice per year. At these events the incumbent is responsible for answering a variety of detailed and diverse Financial Aid questions.

The Financial Aid Advisor is responsible for updating and tracking Fleming Work Study activity and the Fleming Summer Employment Program.

The Financial Aid Advisor is a member of OASFAA – Ontario Association of Financial Aid Administrators.

## 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

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	Approximate % of time annually*
<p><b>1. OSAP Application Processing</b></p> <p>Using the OSAP on-line Administrative Portal and AS400 the incumbent processes and updates applications – including the approval of supporting documents, for OSAP and a variety of other related programs – including loans and grants. Responsible for processing routine changes submitted by students, their parents and/or spouses i.e. income changes, redirection of funds changes, status changes, course load changes, withdrawals, tuition refunds to NSLSC etc. ensuring that all of the necessary documentation is in place and the transactions are properly recorded.</p> <p>Using OSAP Year to Date (YTD) file, analyzes data and anticipates where possible other options available to maximize student’s funding.</p> <p>Maintains accurate and up-to-date information in student OSAP files. Critically examining all information for completeness, accuracy, validity, errors and possible omissions. Verifies details including required supporting documentation (imaged or sent directly to the Ministry) to ensure student files are complete and ready for MCU (Ministry of Colleges and Universities) compliance audit. Advises students whose situations deviate from the norm with respect to next steps and options. Provides budget counseling to students and advises on outside sources of financial aid.</p> <p>Ensures the appropriate release of full time OSAP funds via the Confirmation of Enrolment process and part time OSAP via loan documents. Reviews and appropriately processes C of E’s ensuring correct amounts are redirected to the College for tuition and/or residence fees.</p> <p>Responsible for verifying the available amount of OSAP funding available for payment of Fleming Residence Fees. Evolve system must be updated to ensure that the appropriate fees are deducted from student’s OSAP funding and directed to the college.</p>	35%
<p><b>2. Bursary Application Processing</b></p> <p>Evaluates and processes Fleming College on-line 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>Updates the Ministry Bursary Recording System to reflect bursaries approved for OSAP students including Student Access Guarantee (SAG) allocations and approvals.</p>	20%
<p><b>3. Data Management and Reporting</b></p> <p>Under the direction and/or in consultation with Financial Aid Officers, the incumbent updates student OSAP applications, and/or bursary application details i.e. Withdrawals,</p>	20%

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<p>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. Reviews and analyzes data to support the bursary adjudication process. i.e. Status updates, financial need calculations; application updates.</p>	
<p><b>4. Communication and Information</b></p> <p>The incumbent provides information, to students, college community, and the public, in person, by phone, via e-mail, and by regular mail on all sources of financial assistance available; Fleming College programs and services; registration and record keeping policies and procedures; interpretation of Academic Regulations, Student's Rights and Responsibilities, OSAP policies, Bursary Assistance, Academic Schedule etc. The incumbent is responsible for ensuring the Financial Aid webpages are accurate and up to date.</p> <p>Under the direction of the Associate Registrar Admissions and in collaboration with the Financial Aid Admissions Officer assists with communications to MCU – Student Support Branch personnel, NSLSC (National Student Loans Service Centre), Employment Insurance, Children's Aid Society, Community &amp; Social Services, lawyers, other educational and financial institutions' personnel, College faculty and counselors, and other third parties on behalf of the student. Deals with sensitive and confidential information ensuring that FO.I. is intact.</p> <p>The incumbent takes an active role in College Open House twice per year.</p>	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.

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Up to High School   | <input type="checkbox"/> 1 year certificate      | <input checked="" type="checkbox"/> 2 year diploma  |
| <input type="checkbox"/> Trade certification | <input type="checkbox"/> 3 year diploma / degree | <input type="checkbox"/> 4 year degree or 3 year diploma / degree plus professional certification |

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- Post graduate degree (e.g. Masters) or 4 years degree plus professional certification
- Doctoral degree

Field(s) of Study:

Business/Office Administration or a relevant 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

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Minimum of two (2) years

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.

Strong communication skills (written and verbal) with the ability to effectively convey complicated policy and procedures in a manner that others can clearly understand.

Experience using computer application skills, for Admission, Cashier and Records functions as well as the OSAP on-line system; various software applications i.e. E-mail, word processing, and spreadsheets

Experience dealing with sensitive and confidential information, the F.O.I. Act, and demonstrated customer service excellence and the ability to interact with students and parents from varying social, academic, economic and cultural backgrounds with empathy tact and cultural awareness.

Demonstrated documentation and verification skills as they relate to various financial assistance applications, loan documents and college correspondence.

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**

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Key issue or problem encountered.

Student is ineligible for Fleming Bursary assistance and is challenging the decision made by the incumbent.

How is it identified?

Student or family member may walk-in, telephone or e-mail, to challenge the decision made by the incumbent. The incumbent identifies the ineligible student through evaluation and analysis of bursary application.

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

The incumbent may require additional information from the student and will through one-on-one personal interview/discussion seek out additional or missing details that did not come to light in the original application process. The incumbent uses past practices and extensive knowledge of the Fleming College bursary program.

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

The incumbent must carefully assess all options available through the review of the bursary and OSAP application, supporting documentation and personal information. The incumbent seeks clarification from the student and from other departments including accounting, residence, records and faculty. Unique student circumstances may not have a solution outlined in the bursary application guidelines. The incumbent must consider the uniqueness of each student's personal situation and is required to ask probing and often sensitive questions while maintaining the student's dignity. The incumbent reviews the student's bursary application and supporting documentation within the context of any new information.

In some instances, when all possibilities are exhausted, the bursary review will not be in the student's favour.

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

Established techniques and/or principles, a sound knowledge of bursary criteria, purpose and parameters, own judgement of a situation outside of the norm. Special circumstances that may not have a solution ingrained within college policies/procedures could be discussed with colleagues or manager. Department Bursary Process Document provides guidance.

### 3. Analysis and Problem Solving

#### #2 regular & recurring

Key issue or problem encountered

Student's OSAP funding has changed or OSAP assessment does not demonstrate maximum funding. Incumbent is required to determine why.

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How is it identified?

The issue is identified by the incumbent, through review of OSAP data present in maintenance queries. Year to Date (YTD) download and reports. Can also be identified by the student or family member, referral from a faculty member or counselor.

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

Further investigation is required to identify and clarify the situation. Research and analysis of information through maintenance routines, the incumbent identifies students where there may be an opportunity to generate additional OSAP funding. Using the OSAP 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.

Alternatively, as a result 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 OSAP YTD file is comprised of over 157 fields. Each field has a particular value and significance in the OSAP application. The incumbent will 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

Student does not understand how their OSAP funding assessment was determined.

How is it identified?

The student and/or parent will inquire. Often the inquiry is a result of a change in funding, particularly if reduced or when the student is no longer eligible for OSAP funding.

Is further investigation required to define

Yes – investigation is required to determine the nature of the



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the situation and/or problem? If so, describe.

change on the OSAP application that created the funding adjustment. All funding triggers (income change - parental/student/spouse, status change (disability) FT/PT status, course load, program, ministry restriction, loan default, overpayment, full income variance etc.) have to be reviewed to determine which trigger affected the funding assessment.

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

The student's application is reviewed to determine which funding trigger has affected the funding assessment. Once isolated, the incumbent has to determine if the details are accurate. Based on the information provided by the student, the incumbent determines which changes can be appropriately initiated and/or what additional documentation is required to edit the application. The incumbent will also verify program course load through the Records Evolve system, check that the student is enrolled in the correct semester of the correct program, that all fees are correct on the Finance section of the student centre. The end result may also require a full OSAP Appeal Process, explanation and follow up.

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

Ministry OSAP processing guidelines provide the framework under which the OSAP loan and grant programs are administered. Past practice, OSAP audit compliance requirements for program delivery are also available as reference. It is important to note that the guidelines and policies do require a significant level of interpretation in application and practice. There are often circumstance exceptions that are not documented within the policies and procedures. The incumbent will refer to Evolve system (Records, Admissions, Finance tabs).

### 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.

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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 Advisor will refer to the appropriate Service Area or escalate to a Financial Aid Officer.

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 explain 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 a Financial Aid Officer.

### #2 occasional

Key issue or problem encountered

Student is faced with a withdrawal from a semester of a program and needs to determine how best to maintain OSAP eligibility for future semesters.

How is it identified?

Student has contacted Financial Aid Advisor in person, by phone or e-mail or through other department.

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

Calculation of the program "level load" required to maintain OSAP eligibility; determination of previous academic issues with OSAP. Incumbent must determine if student will maintain OSAP funding eligibility. Determine if the student has a documented disability and can be enrolled in a reduced course load. If the student plans to return to their program of study, will they have the required academic prerequisites if they withdraw. Verify that the classes that the student requires are offered in the semester that the student indicates that they wish to attend. If the student is not returning to the same program of study, incumbent must review the number of

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

programs taken and determine if a Restriction is warranted due to multiple program changes.

Analysis is completed by using Evolve tables to calculate the level load of the program as it relates to OSAP eligibility. Consulting the curriculum of the program as listed on the Fleming College website and referencing the required courses and prerequisites, and number of program changes. Incumbent will thoroughly consult both OSAP on-line systems to verify student's continued eligibility to receive OSAP assistance.

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

Available sources of information – OSAP processing guidelines, Evolve systems, past practice, knowledge of Records processes and Admissions internal application process, Cashier functions. Refer student to Counsellor if situation requires a disability educational plan.

#### 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.

The incumbent is responsible for maintaining the accuracy of information 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. Issuance of Academic Restriction Letters, updating OSAP file – notifying the Ministry of the status. At the end of each semester the incumbent is required to review each OSAP applicant who has not maintained satisfactory academic progress – determining first occurrence or second occurrence and issuing a warning or an OSAP restriction. There is a small window of time to plan for and co-ordinate this process between the end of one semester and the beginning of the next.

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

Must be able to break down large data sets into manageable sections to process and ensure the application accurately reflects current circumstances. Time management, self-

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

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.

How is/are deadline(s) determined?

The details or data used to update a student OSAP record is sourced from a variety of places; academic and student record, student account, current and past OSAP records, bursary applications, current and past student communication, OSAP policy/procedure. Incumbent is required to review the information to determine what changes or amendments are required.

Deadlines are determined by the Financial Aid Team in consideration of 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's OSAP account are required. The incumbent must determine if the timing of this change is detrimental to the student's OSAP funding and to what extent. The incumbent also determines whether the changes have an impact on other financial aid mechanisms such as a bursary application and must assess the accuracy of the application.

#### 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.

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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 recording of the bursaries on the BRS and notifying the students of the bursary decision as long as the timing remains within the original end date.. 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.

The incumbent is responsible for maintaining and tracking Fleming Work Study Program and Summer Employment Program activity across the College.

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 in the presence of competing deadlines and projects.

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

A tracking spreadsheet which lists all activity per student; maintenance queries to identify qualified students; FWSP applications and budgets; department recovery accounts. Knowledge of the FWSP program policies and protocols.

How is/are deadline(s) determined?

Overall deadline is established as per College fiscal period. FWSP reimbursement requirements are monthly and handled as applications and finalized details are provided by departments and as per payroll timelines.

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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 project or timeline is required. This may also require consultation with both Finance and HR-Payroll.

## 4. Planning/Coordinating

### #1 occasional

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

Each year, Fleming College hosts two Open House events for prospective students and interested community members. The College also hosts C.I.P tours and Welcome Days. The incumbent is responsible for ensuring that all of the Financial Aid print materials are current and up-to-date for this event. In addition, the incumbent ensures that the Financial Aid presentation table is welcoming and visible to our visitors

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

In preparation for this event, the incumbent is required to ensure that the necessary materials are properly reviewed and updated in sufficient time to meet production deadlines in the Duplicating Services Department, and be available for the event. This will require consultation with department colleagues, verification of ministry specific materials and the removal of outdated information. The incumbent will order appropriate brochures and OSAP promotional material from Service Ontario.

On the day of the event, the incumbent requires solid communication, inter-personal skills in order to represent the College and interpret and convey information to the interested public regarding the variety of Financial Aid options available. Incumbent must be able to explain the complexities of OSAP to an audience that has no previous knowledge or experience in this area. Strong customer service, interview and sales techniques are required along with attention to detail and the ability to multi-task.

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

Ministry resource page (specifically forms), college website, current OSAP guidelines, past practice, knowledge of current bursary programs. Sound knowledge of internal and external bursary opportunities. Other bursary options as researched on-line, and other funding mechanisms outside of OSAP i.e. student line of credit.

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.

The Financial Aid Team makes decisions regarding changes to the activity as it relates to Financial Aid. This is done in consultation with Marketing Department who have the primary responsibility of organizing the entire event to ensure that there are no negative impacts of our proposed changes.

### #2 occasional

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

The Financial Aid Office must communicate information to students to ensure that they are aware of various deadlines, osap requirements and activities. The incumbent is responsible for sending emails and communications to students based on the pre-established communications schedule. The incumbent is also responsible for ensuring information on the Financial Aid webpages is accurate and kept up to date.

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

The incumbent must ensure that financial aid related information is accurate and up to date. The incumbent must ensure that the data and reports they are using are accurate and timely.

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

Ministry resource page (specifically forms), college website, current OSAP guidelines, past practice, knowledge of current bursary programs. Sound knowledge of financial aid process timelines and academic schedule.

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How is/are deadline(s) determined?

The dates of the actual events can be determined by policies and procedures, ministry, Financial Aid Officer-Lead, Associate Registrar. However, the critical path dates leading up to the communications are established by incumbent in consultation with the Financial Aid team.

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 Associate Registrar, makes decisions regarding changes to the activity as it relates to Financial Aid.

### 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
<input type="checkbox"/>	<input type="checkbox"/>	Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
X	<input type="checkbox"/>	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>The incumbent works with the student to complete their osap application from start to finish. They guide the student in preparing the review package.</p>
X	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities	Advises and recommends to students the appropriate action required with respect to a variety of academic issues and/or 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.

Registrar's Office front counter staff will regularly consult 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 front counter staff member, and require the incumbent to provide guidance with respect to process and procedure.

- 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.
  
- 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.

### 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)

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<p>Very few instructions are provided at the beginning of a work assignment. The incumbent is expected to evaluate what tasks that are to be completed on a daily basis, and rearrange priorities as circumstances require.</p> <p>There is a considerable amount of autonomy in this position. Incumbent is expected to search out appropriate information if unknown, and work collaboratively with co-workers to establish best course of action.</p>	
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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 Manuals  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.</p> <p>Random inspections are conducted by the Ministry Compliance and Verifications Branch.</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)

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Ministry OSAP Program Manuals  
 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

**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)
How to handle an unusual bursary decision – where circumstances are outside the ordinary. The incumbent will consult with other Financial Aid team members or other College departments to gather more information as required to ensure the decision making process has been objective.	

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)
Consideration for approval of actions which fall outside the jurisdiction of established policy or guidelines i.e Approval of an emergency loan, or bursary that falls outside the normal limits.	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.	Recommended changes to processes and/or procedures

Describe the type of decisions that would be decided by the incumbent.

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Regular and Recurring	Occasional (if none, please strike out this section)
<p>When providing options to students whether it be with respect to financial assistance, course selection, timetables, interpretation of college policy/guidelines, incumbent is required to ensure that students/college staff/external community are directed appropriately.</p> <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 on a daily basis. 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>	

**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?		
<p>Contact is made in person, by phone, e-mail or fax. – inquiries are handled by the incumbent</p>	<p>The incumbent must ask clarifying questions to develop a thorough understanding of the request to determine how to best proceed. The most appropriate service is often determined to meet the specific needs of a student's particular circumstances. Some inquiries are straight forward with an established</p>	<p>Student, faculty, other College staff, counselors and general public</p>	<p>D</p>

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	process.		
Contact is made via email or via phone inquiry – inquiries are handled by the incumbent	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 analyse the information as it relates to Financial Aid. Procedure manual and past practice can provide assistance.	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.	D
Request from outside agencies regarding specific OSAP information or confirmation of student status made in person, by phone, mail, fax and e-mail.	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. Responds to telephone and e-mail inquiries from high school guidance counselors and outside agencies regarding OSAP and offers advice regarding supports available.	Outside agencies and Government Organizations including	W

\* 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)
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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	,l)* D
Explanation and interpretation of information or ideas	By phone, e-mail (own Fleming e-mail and Financial Aid alias 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 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, responding to inquiries received by phone, in person, or e-mail.	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.		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 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)

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- 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
Bursary application processing	W	X		

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

Usually

No – The incumbent is the first line of contact for the front counter staff and is often interrupted due to student or staff inquires. Their attention is required to refocus on the most immediate need of the student or staff member making the inquiries. As it relates to the Bursary application process, to determine eligibility, attention to detail and accuracy is required along with updating/maintaining spreadsheet. Interruptions to this process can easily cause the incumbent loss of concentration and/or focus throughout the duration of the activity.

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Confirmation of Enrolment Processing and “OSAP One-Key” item maintenance – On-going multi-step process with some peak periods such as semester start time	D	X		

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

Usually

No – The above transactions require greater than normal mental focus to ensure that the correct data is reviewed prior to confirming the release of OSAP funding to the student. Failure to do so could result in the release of OSAP funds in error. Student and staff interruptions are frequent especially during peak processing times.

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs



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Reviewing individual student academic progression to determine continued OSAP eligibility, probationary warning or restricted status	W	X		
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually X No – This is a multi step process that requires greater than normal mental concentration to ensure the accurate determination of academic progress; the outcome of this exercise will determine the next course of action – OSAP probationary warning or restriction which impacts the student's eligibility for future OSAP eligibility. The incumbent is often interrupted due to direct student and staff inquiries. Such interruptions result in the incumbent frequently having to backtrack to determine if any steps have been missed before moving on in the process.				

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### 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)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)		D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input checked="" type="checkbox"/> 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
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<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		
<input type="checkbox"/> smelly, dirty or noisy environment		
<input checked="" type="checkbox"/> travel	Occasional travel to Frost Campus for	I

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	staffing coverage.	
working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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