
POSITION DESCRIPTION FORM (PDF)

Part-time Support Staff

Instructions for Completing the PDF:

- This 'smart' form template is to be completed & submitted electronically to the HR Consultant.
- Complete each section as accurately and succinctly as you can in the space provided. If you have questions, contact your respective HR Consultant for assistance.

Depending on the duration of the work assignment, you will be required to complete the Cover Page and Part 1 only **or** Parts 1 & 2 **or** Parts 1, 2 and 3.

CPT/TPT Tier I - Cover Page and Part 1 only

- Casual/temporary part-time support staff work that is temporary/transitory only and will not exceed a duration of one academic semester (4 months).

CPT/TPT Tier II - Cover Page and Parts 1 & 2 only

- Casual/temporary part-time support staff work that is term certain but that will be for a duration of more than one academic semester up to two academic semesters (more than 4 months up to 9 months).

RPT only - Cover Page and Parts 1, 2 & 3

- Regular part-time (RPT) support staff work that is required as part of ongoing operational needs and is considered to be long-term/permanent in nature.

POSITION DESCRIPTION FORM (PDF)

Regular Part-time Support Staff

Position Title: Financial Assistant (OARI)

Position Number: PT0287 **Pay Band:** 8

Reports To: [Click here to enter text.](#)

Appointment Type: 12 Months **“Other” Hours Details:** [Click here to enter text.](#)

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

PDF Completed By (Manager Name):

Effective Date: June 25, 2026 **Last Revision:** [Click here to enter text.](#)

SIGNATURES

Incumbent: _____ **Date:** _____

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

Supervisor: _____ **Date:** _____

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

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

PART ONE:

POSITION SUMMARY:

Reporting to the Executive Director, Applied Research & Innovation, this position plays a pivotal role in supporting the financial operations of the OARI, and works closely with the Research Grants Financial Officer in supporting the financial administration of all research grants at the college, including to but not limited to the Centre for Advancement of Water & Wastewater Technologies (CAWT), the Centre for Innovative Aquaculture Production (CIAP) and the Centre for Applied Machine Intelligence and Integration Technologies (CAMIIT).

This role is responsible for supporting procurement for large infrastructure projects and all asset management tracking for OARI, including the preparation, submission and tracking of low dollar value RSFQs. As well, this position is responsible for tracking all assets of the research division.

This position will also be responsible for coordinating the day to day financial and payroll transactions of the research office, in accordance with various deadlines, including invoices for payment through Visa, cash expenses and purchase requisitions as well as payroll contracts, timesheets for a variable number of administrators, faculty researchers, research technologists/technicians and students.

KEY DUTIES & RESPONSIBILITIES

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

	Summary Details	Percentage %
1	Accounts Payable/Visa/Expense - Tracks and processes all visa and cash expenses for research staff - Orders/Cancel/Changes credit cards - Collates invoices with visa statements and reviews for accuracy - Reconciles credit card statements for applicable staff - Creates and requests invoices for cash contributions and fee for service contracts through Finance; and	40%
2	HR/Payroll Transactions - Assists with the processing and flow of all payroll transactions of the OARI in accordance with various deadlines, including payroll timesheets, grant timesheets, standard workload forms, requests for faculty release, exception reports, overtime forms. - Scans, copies or distributes all necessary paperwork for auditing records to shared drive or to internal departments (finance, human resources) as	35%

	Summary Details	Percentage %
	requested as well as to external funders as required.	
3	Purchasing Support • Key contact for all purchasing for the research centres at the college • Ensures adherence to the college's Purchasing Policy and the Ministry's Expense Directive • Prepares low dollar value RSFQs in accordance with the process set out by Purchasing • Acts as main contact for applicable Requests for Quotes • Obtains quotes for budgets at the proposal stage • Tracks all quotes received and communicates with bidders as appropriate • Enters requisitions and tracks delivery and receipt, requests supplier data forms from new vendors and acts as primary liaison with applicable vendors • Drafts Non-Competition requests for management review • Seeks guidance from Purchasing department when required • Coordinates and receives specifications from technical staff for drafting final specifications	10%
4	Research Capital Tracking • Supports capital intensive grants (e.g, CFI) by preparing equipment lists, supporting researchers preparing equipment specs, supporting cost estimates, and tracking vendor discounts • Tracks and tags all grant-funded research equipment of the college into a central inventory system • Monitors Infrastructure Operating Fund (IOF) for all CFI equipment	10%
5	• Other Duties As Assigned <i>(do not amend this section)</i>	5%
6		

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

For example:

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

PART TWO:

TRAINING & TECHNICAL SKILLS

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

Formal Education Requirements:

Completion of a two (2) year college diploma.

Field(s) of Study:

Accounting and/or Business Administration

Other Vocational Certifications and/or Apprenticeships:

[Click here to enter text.](#)

EXPERIENCE

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

Practical Work Experience:

More than three years up to five years.

Additional Skills & Abilities:

- Experience processing financial transactions and associated administrative tasks, including the use of spreadsheets (Excel)
- Proficiency in a variety of software including but not limited to Excel, Word, Outlook, Internet browsing applications, Webex, Zoom and Microsoft Teams
- Experience interpreting various federal and provincial research funding guidelines is preferred
- Experience with formal public sector procurement process and BPS legislation and asset tracking
- Specifications and technical writing ability
- Experience with international travel, currency & customs
- Excellent organizational skills.
- Must be able to maintain confidentiality and demonstrate tact and diplomacy at all times
- Must have strong communication and interpersonal skills and be able to function professionally and efficiently in stressful situations
- Demonstrated ability to prioritize tasks, proactively analyze and anticipate issues, effectively solve problems in a timely manner and exercise sound judgment.
- Effective team player (with multiple teams) with a commitment to quality improvement processes.
- Ability to work with significant autonomy.
- Ability to multi-task.
- Ability to work in a high-pressure environment with constantly changing priorities
- Strong attention to detail
- Training in Broader Public Sector Procurement is an asset

COMPLEXITY

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

Example #1

Task / Activity: Monthly Payroll to Grant Allocation Review

Description: Each month the incumbent must review the daily hours for the month for approximately 35 employees in different researcher areas who are part of different employee groups and on different contracts to ensure each hour is allocated to the correct grant. This is a complex process as there are many active grants and the hours must both match what is on their contract as well as the budget remaining in the grant for salaries. Incumbent receives the recorded time in a form of timesheet (not a payroll timesheet) that itemizes each day of the month and the hours allocated to specific projects (grants). The incumbent must verify the weekly hours recorded against the employee's contract as well as verify that the department the hours are allocated to has remaining budget for the hours recorded. If there is missing or inadequate information, the incumbent must follow up with the employee and/or the employee's Manager.

Example #2

Task / Activity: Monthly Corporate Card Expense Review and Reconciliation

Description: Each month the incumbent is responsible for collecting and reviewing the visa statements for approximately 10 staff members. Often information is incorrect, receipts are missing, or not enough detail is provided in the explanation for the expense. The incumbent must have a good understanding of the general ledger accounts and departments of the research centres. If improper accounts or departments are used, there could be negative impact on the financial statements, and the departments and could result in a loss of funding if recorded in an unfunded department. Therefore, the incumbent is to have an in-depth knowledge of all active research grants. To solve the situation, the incumbent would verify the invoice with the employee (or vendor) and follow up with the Research Grants Financial Officer to ensure there is adequate budget for the expenses. Where information is missing, the incumbent would follow up with the employee.

Key Considerations:

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

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

Routine

How would you describe the complexity of the work?

Some duties are varied and complex.

Describe the business processes used by the position.

Processes are specific and related.

JUDGMENT

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

Example #1

Task / Activity: Travel Expense Compliance Review
Description: An employee submitted an expense form for travel, meals and mileage costs but did not provide proof of pre-authorization for the travel which is a requirement of NSERC funding. Incumbent reviews the expense recorded against the invoice that was provided. The incumbent must determine if the employee simply forgot to provide the pre-authorization form or if the employee did not obtain pre-authorization for the expenses.

Example #2

Task / Activity: Travel Reimbursement Compliance Monitoring
Description: The incumbent receives an expense statement for review that includes a mileage expense that exceeds the threshold allowed by the college travel policy. Incumbent would ask for rationale from the employee as to why a car wasn't rented and whether they had approval from their manager to claim mileage.

Key Considerations:

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

The work duties typically require:

Breakdown facts or components of the problem situation to find a solution.

In determining a solution for problems, the incumbent has discretion to:

Uses established analytical techniques.

MOTOR SKILLS

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

Example #1

Task / Activity: Accounts Receivable Management and Reconciliation
Description: The incumbent coordinates and tracks all Accounts Receivable for OARI, the payment of invoices by industry partners for cash contributions to projects and fee for service contracts undertaken by the research centres. This includes issuing and sending invoices to partners, tracking payment and following up on delinquent accounts. Incumbent must have a system in place for tracking payments and reconciling accounts on a monthly basis.

Example #2

Task / Activity: Grant Budget Tracking and Capital Project Administration
Description: Canada Foundation for Innovation (CFI) grant submission valued at \$2M for research infrastructure and equipment. The incumbent is responsible for supporting the researchers in preparing a list of instrumentation and equipment that will be submitted with the proposal, tracking quotations received as well as vendor discounts that will be part of the proposal submission. In addition, the incumbent is responsible for tracking construction and renovation costs and change orders associated with the project. The incumbent keeps a master list of quotes as they come and keeps a running tally of the overall value to ensure the value of the equipment does not exceed the threshold for the grant. If the grant is awarded, the incumbent is responsible for post-award tracking of purchases and liaising with Purchasing and Finance to reconcile the grant account.

Key Considerations:

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

When considering 'speed' of fine motor movements for this position:

Speed is a major consideration.

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

Task	% of Time
Accounts Receivable Management and Reconciliation	50
Grant Budget Tracking and Capital Project Administration	50

PHYSICAL DEMAND

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

Example #1

Task / Activity: Sitting
Description: Daily, 1-2 hours at a time and has the ability to reduce strain

Example #2

Task / Activity: Carrying boxes of files
Description: Infrequently, less than 1 hour at a time and has the ability to reduce strain. File boxes would be light, up to 5kg or 11 lbs.

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

Task	% of Time
Sitting	95
Carrying boxes of files	5

How would you describe the frequency of the physical demands of this position?
Occasional (part of the day)

How would you describe the nature of the physical demands of this position?
Light

How would you describe the physical strain on this position?
Comfortable body positions with flexibility of movement.

SENSORY DEMAND

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

Example #1

Task / Activity: Tracking of all financial transactions (expense statements, invoices, etc)
Description: This task would occur daily, up to 2 hours

Example #2

Task / Activity: Asset tracking
Description: This task would occur monthly, for more than 2 hours

Key Considerations:

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

How would you describe the requirement for attention to detail in this position?
Frequent (>60%)

How would you describe the requirement for sensory demand in this position?
Moderate

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

Task	% of Time
Tracking of all financial transactions (expense statements, invoices, etc)	85
Asset Tracking	15

STRAIN FROM WORK PRESSURES / DEMANDS / DEADLINES

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

Example #1

Task / Activity: Monthly financial processing deadlines with competing priorities and interruptions
Description: Each month, the incumbent is responsible for processing a high volume of financial transactions including Visa reconciliations, expense claims, purchase requisitions, invoices for payment, and payroll-related submissions for research staff and students across multiple centres. These tasks must be completed within strict month-end deadlines and payroll cut-off schedules. During this period, the incumbent is frequently interrupted by urgent requests from researchers requiring immediate procurement support for time-sensitive research activities or clarification from Finance or Purchasing on coding, approvals, or missing documentation. This creates competing priorities where the incumbent must continuously re-sequence workload while ensuring accuracy and compliance is not compromised.

Example #2

Task / Activity: Managing grant compliance, asset tracking, and procurement approvals under external funding requirements
Description: The incumbent is responsible for tracking assets, procurement, and expenditures across multiple active research grants, each governed by specific funding agency rules and budget limitations. At the same time, researchers may request expedited processing or attempt to proceed with purchases that require additional approvals or adjustments to funding allocations. The incumbent must reconcile incomplete documentation, follow up with vendors or staff for missing details, and resolve discrepancies while ensuring compliance with institutional policies and external funding requirements. This often involves managing conflicting demands between project urgency and financial compliance obligations.

Key Considerations:

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

How would you describe the workflow demands this position typically faces?
Deadlines are reasonable and rarely change.

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

How would you describe the level of interruptions this position faces?
Interruptions occur regularly but tend to be predictable.

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

Task	% of Time	Predictability*
Monthly financial processing deadlines with competing priorities and interruptions		PR (Predictable)
Managing grant compliance, asset tracking, and procurement approvals under external funding requirements		PR (Predictable)

INDEPENDENT ACTION

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

Example #1

Task / Activity: Special projects
Description: Special projects are outlined generally by the Executive Director, Applied Research and Innovation. The incumbent has autonomy to make day to day decisions and most assignments are completed with no supervision. Independent judgment and thinking is required throughout the span of an assignment.

Example #2

Task / Activity: Department priorities with Executive Director
Description: Travel bookings, logistics/confirmations. External suppliers - Cost estimates, ordering supplies, return policies. External stakeholders – Industry partners regarding invoicing. Purchasing – procurement of equipment Finance – expense procedures and guidelines

Key Considerations:

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

What type of instruction is typically given to the incumbent?

Works within established practices.

What degree of supervision is typically provided to the incumbent?

Periodic supervision; occasional supervisory input.

How is the work typically checked and verified?
Output is reviewed by someone else.

How frequently is the work checked?
Mostly reviewed at point of task completion.

Describe duties which are the incumbent's responsibility where independent action requires initiative and/or creativity and indicate how often the duties occur. Identify the typical situations or problems that are normally referred to the Manager for solution.

COMMUNICATIONS / CONTACTS

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

Nature of Contact (Who)	Purpose of Contact (What)	Frequency
Research Grants Financial Officer	Day to day interactions with Research Grants Financial Officer include face to face verbal communication, email & phone. All interactions relate to day to day financial transactions in the OARI as well as monthly reporting to various college departments (Payroll, Accounting Operations)	Daily
Executive Director, AR	Day to day interactions with Executive Director, Applied Research & Innovation face to face, email & phone. All interactions relate to calendaring, budgets and planning.	Weekly
Staff	Day to day interactions with team at CAWT, CIAP, CAMIIT & OARI related to deadlines for expenses, timesheets and procurement rules.	Daily
Staff	Explaining Purchasing guidelines to team at CAWT, CIAP, CAMIIT & OARI; explaining expense directives/procedures	Daily
		Choose an item.
		Choose an item.

Key Considerations:

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

Communications in this position are typically engaged for the purpose of:

Providing detailed explanations, clarification and interpretation, empathize with the needs of others.

What type of involvement does this position have with confidential information?
Regular involvement with significant disclosure implications.

RESPONSIBILITY FOR DECISIONS AND ACTIONS

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

Example #1

Task / Activity: Policy interpretation
Description: Incumbent advises all research employees and student employees regarding policy interpretation related to expense claims, travel forms, timesheets and visa statements,

Example #2

Task / Activity: Purchasing advice to researchers
Description: Incumbent advises researchers on proper procedure for obtaining quotes for purchases and in general advises staff on Purchasing procedures and guidelines

Key Considerations:

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

How errors are typically detected for work completed by this position?

Errors usually detected through verification and review processes.

What is the typical scope of impact to the organization for errors in this position?

Results in significant waste and negative impacts to operational effectiveness.

WORK ENVIRONMENT

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

- The probability or likelihood of exposure to disagreeable/hazardous elements.
- The nature of the disagreeable/hazardous element
- Length of exposure while on the job
- Travel

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

Environment	% of Time
Professional office environment Yes	100%
Outdoor work; seasonal conditions No	0%
Other (please specify)	
Other (please specify)	

Key Considerations:

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

[Choose an item.](#)

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

[Choose an item.](#)

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

Infrequent (less than 10% of their time in transit)

SUPPLEMENTAL DATA

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

[Click here to enter text.](#)