UNIVERSITY OF VICTORIA
CUPE LOCAL 951 POSITION DESCRIPTION

<table>
<thead>
<tr>
<th>JOB: Clerk PB7</th>
<th>TITLE: Scholarship Assistant</th>
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<tbody>
<tr>
<td>DEPARTMENT: Office of the Registrar</td>
<td>POSITION NO: 995876, 993038, 995116</td>
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<tr>
<td>SUPERVISOR: Scholarship Officer</td>
<td>LAST UPDATED: 2010</td>
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SUMMARY:

Reporting to the Entrance and In-course Scholarship Officers, the Scholarship Assistants are part of the team within Student Affairs and Financial Assistance (SAFA) that administers the scholarships and awards programs. In conjunction with each other, the Scholarship Assistants provide administrative support for the undergraduate scholarships and awards programs and secretarial support to the Senate Committee on Awards. This includes: processing scholarship and awards applications; collecting scholarships and awards materials; accessing the UVic Banner system on a daily basis in accordance with the scholarship and awards regulations and guidelines to enter scholarships and awards data, confirm registration and course load etc.; clerical accounting duties; and, providing scholarships and awards programs information to prospective applicants, their parents, counsellors, UVic students, faculty and staff regarding all aspects of the undergraduate scholarship program regulations, procedures and eligibility requirements including the complex external Canada Interuniversity Sport Scholarship regulations.

The Scholarship Assistant supports the Entrance Scholarship Officer in administering the undergraduate entrance and transfer scholarship programs for both domestic and international students. These two programs offer over 4,500 scholarships with a value of over $12 million to students each year. The Entrance Scholarship program primarily runs between January 01st and May 31st and during the month of August when final marks come in.

The Scholarship Assistant also supports the In-course Scholarship Officer in administering the undergraduate in-course scholarship and the athletic awards programs for current students. These programs oversee approximately 750 non-renewable scholarships and awards to over 1400 students with each scholarship and award having its own specific terms of reference, as well, approximately 400 renewals of excellence scholarships are awarded each year. These programs are accountable for a budget of over $4.5 million dollars per year. The in-course scholarship and awards programs’ busiest times of the year are between April 1st to September 30th and during the month of January. The Athletic Award program has busy periods during the following months, May, December and January. However, awards are given out throughout the year.

Scholarship Assistants work as part of a team to ensure continuity of excellent service in a busy environment with the goal of positively contributing to a student’s learning and success.

Regular hours for this position are Monday to Friday, 8:30 to 4:30pm. A modified work week may be available.
## MAJOR RESPONSIBILITIES AND DUTIES:

### 1. Responsibility: SCHOLARSHIPS/AWARDS GENERAL ADMINISTRATIVE DUTIES, ALL PROGRAMS (40%)

**Duties:**
- Processes online student scholarship and award applications
- Sets up and maintains scholarship and award student files in Banner adding electronic and scanned paper documentation as it is submitted
- Creates and maintains scholarship/award-specific excel spreadsheets to track required documentation missing from individual student applications, student acceptance/decline of scholarship offers etc.
- Develops messaging tools to email follow-up notices to students regarding missing and required scholarship and award documentation
- Reviews and verifies if candidates have met scholarship and award eligibility requirements pulling information from Banner as necessary i.e. full-time status, GPA, program/faculty enrolment to ensure terms of the scholarships/awards are satisfied
- Uses knowledge of the scholarships and awards eligibility requirements to identify and resolve anomalies between the terms of the scholarship/award and the nominations i.e. faculty/department allocating more money than the specific scholarship/award budget allows
- Follows-up with UVic departments and faculties as required to obtain additional eligibility information including the Resource Centre for Students with Disabilities
- Composes, edits and distributes scholarship and award notification letters and emails to successful applicants on behalf of SAFA
- Updates status of student scholarship and award files in Banner declining each scholarship/award in which the student was not successful, entering the amount of each scholarship/award, or specifying whether the student has accepted/declined the scholarship/award offer
- Creates and revises descriptive scholarship and award information in Banner including information on external individuals/organizations/companies providing scholarships/awards to UVic students
- Designs and runs reports and queries in Banner/Viewcat for scholarship and award reporting purposes i.e. offer/decline reports, student registration reports, identify incomplete/inactive scholarship applications after expiration of one-month application deadline
- Composes, edits and posts scholarship and award news (i.e. scholarship/award deadlines, new scholarship/award information) to Twitter and on the SAFA website as needed
- Meets all scholarship and award program deadlines

### 2. Responsibility: SCHOLARSHIP/AWARD-SPECIFIC ADMINISTRATIVE DUTIES (25%)

**Duties:**
**EXTERNAL SCHOLARSHIPS/AWARDS**
- Receives, processes and completes confirmation of enrolment requests for external scholarships and awards preparing and distributing confirmation of enrolment letters to external organizations, companies, etc.

**ENTRANCE & TRANSFER SCHOLARSHIPS**
- Receives and processes emails from returning students wishing to apply for transfer scholarships
- Liaises with Undergraduate Records regarding returning transfer students to obtain transfer transcripts for scholarship review
- Updates Banner student files upon receipt of marks from teachers and flags the student file in Banner for the Entrance Scholarship Officer’s review
- Inputs ‘eligibility’ code on eligible students’ Banner files to ensure priority registration in June

**INCOURSE SCHOLARSHIP ADMINISTRATION**
- Prepares and distributes scholarship recommendation forms to all departments and faculties
- Tracks the return of the forms, the recommended candidates, and follows-up as required if forms are not returned
• Creates and hand-delivers memos to the Deans of each faculty for sign-off on convocation medals and awards each May

RENEWABLE SCHOLARSHIP ADMINISTRATION
• Assists with the receipt and printing of application documents, and the verification of student eligibility, for renewable scholarships not included in the online scholarship applications i.e. Schulich Leader Scholarship, UWC/CIS/AK International Scholarship, John MacDonald Travelling Scholarship, AUCC scholarships
• Manually tracks received documents
• Compiles spreadsheet of eligible candidates for the Scholarship Officers review
• Performs GPA calculations (if necessary, best 12 units of the final marks for the academic year) for renewable scholarship eligibility and updates the scholarship renewable tracking spreadsheets as required
• Emails students who do not meet renewal eligibility requirements with information on the appeal process

ATHLETIC AWARDS ADMINISTRATION
• Provides accurate information regarding regulations to students in person, by email or by paper about award criteria and eligibility following complex external Canada Interuniversity Sport regulations governing all varsity sports in Canada
• Uses diplomacy in detailed correspondence with UVic Athletics Department regarding method of delivery of payments to athletes i.e. tuition fee credit or cheques

3. Responsibility: GENERAL INQUIRIES (15%)

Duties:
• Provides accurate and up-to-date information to prospective and current applicants, parents, counselors, UVic students, faculty and staff regarding all aspects of the undergraduate scholarship and award programs’ regulations, procedures and eligibility requirements
• Adheres to the scholarship and award regulations and guidelines when providing clear and concise scholarship information
• Responds to email and phone enquiries in a timely fashion – usually within one business day
• Uses diplomacy and tact when responding to difficult situations
• Uses judgment to refer challenging and complex enquiries to the Scholarship Officers for resolution

4. Responsibility: CLERICAL ACCOUNTING (10%)

Duties:
• Checks deposits and credits in FAST verifying donor transactions have been made to the correct FAST account
• Updates scholarship and award bookkeeping ledgers (i.e. athletic award ledger) tracking and updating the annual scholarship and award donor payments and disbursals to ensure accurate balances are maintained for each annual scholarship/award
• Creates cheque requisitions and journal vouchers/entries
• Updates Banner to reflect a cheque was prepared rather than a tuition fee credit issued
• Maintains accurate contact information for graduating students for purposes of awarding cheques and prizes
• Liaises with other UVic departments and faculties regarding scholarship/award funding; tracks departmental transfer of scholarship/award funds into FAST account for disbursal and payment to students
• Uses FAST to review external scholarship/award donations and accurately update the Athletic award ledger (excel spreadsheet) debit and credits so as to maintain accurate balances for each annual award

5. Responsibility: SENATE COMMITTEE ON AWARDS/SENATE (10%)

Duties:
• Prepares, distributes accurate meeting Agenda and Minutes
• Receives, records, and processes supporting documentation for the Agenda
Gathers information to answer SCA committee member questions concerning scholarships/awards
Tracks and receives student appeal information for entrance and in-course renewable scholarships
Prepares student appeal information for meeting Agenda including the reason for appeal, faculty, GPA, student letter to SCA, and complies supporting documentation including doctor, counsellor, or medical note, UVic unofficial transcript, or secondary school transcript
Updates appeal spreadsheet with SCA decision; and if the appeal is successful, the renewal spreadsheet and Banner files are also updated
Emails approved scholarship/award files to the University Secretary’s Office for Senate review and approval by required deadline
Post-Senate approval, sets up new and revised scholarships and awards in Banner; ensures scholarship and award files are scanned and updated accordingly; and, posts and/or updates revised scholarships/awards information on the SAFA website
Attends meetings and takes minutes
Contacts meeting members for monthly meeting availability and schedules meetings
Books monthly meeting room

REQUIRED QUALIFICATIONS:

Skills:
• Excellent interpersonal, communication, and clerical skills
  - Are required to relate effectively within a team environment, as well as the University community and external contacts
  - Good spoken and written communication skills
• Initiative
  - Be able to problem solve by using sound judgment and
  - Work independently with limited supervision
  - Able to determine when a problem needs to be taken to a higher authority
• Tact and diplomacy regarding sensitive and/or confidential matters
  - Be able to follow the FOIPPA guidelines
• Ability to handle detailed information, accurate mathematical calculations, and enter data with a high degree of accuracy
• Ability to prioritize and perform detailed work accurately in a fast paced environment with constant interruptions and strict deadlines

Specialized Knowledge/Education:
• Knowledge of University systems such as Banner and FAST Financial are an asset.
• Knowledge of Microsoft Office Suite; Banner Student System; Banner Extender; PC (Thin Client); Fast Financial; Cascade web maintenance; Adobe Pro are an asset.

Experience: Office or business administration
• At least two years minimum experience in office administration or equivalent combinations of training, education and/or experience may be considered, preference will be given to applicants who have business training or certification
• Experience answering general and complex inquiries by applying knowledge of existing policies or procedures.
• Knowledge of the post-secondary organization, roles, policies and systems of central and academic units of the University are an asset

Employee’s Signature:                       Date:

Supervisor’s Signature:                     Date: