UNIVERSITY OF VICTORIA  
CUPE LOCAL 951 POSITION DESCRIPTION

<table>
<thead>
<tr>
<th>JOB:</th>
<th>TITLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerk/PB7</td>
<td>Financial Aid Assistant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DEPARTMENT:</th>
<th>POSITION NO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Awards and Financial Aid</td>
<td>997862, 997903, 997904</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPERVISOR:</th>
<th>LAST UPDATED:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director, SAFA</td>
<td>November 25, 2014</td>
</tr>
</tbody>
</table>

SUMMARY:

Reporting to the Director of Student Awards and Financial Aid, Financial Aid Assistants provide excellent customer service to students, staff and faculty in person at the front counter, on the phone and via email. This includes providing information regarding all Student Awards and Financial Aid programs such as bursaries, scholarships and work study. Providing advice and guidance to students regarding various government aid programs (student loans) is also a large part of these positions.

Financial Aid Assistants access government databases and portals on a daily basis to confirm, update and obtain student loan information. They also verify student status in Banner in accordance with government regulations with regard to registration and course load and to process student loan withdrawal and academic completion information.

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

Regular hours for this position are Monday to Friday, 8:30am to 4:30pm. A modified work week is an available option.

MAJOR RESPONSIBILITIES AND DUTIES:

1. **Responsibility: Front counter reception and service 50%**

   **Duties:**
   - Responding to all inquiries from prospective students and their parents, current students, faculty and staff for detailed information, application processes and regulations concerning all government student assistance, undergraduate and graduate bursaries, work study, emergency loan and undergraduate scholarship programs.
   - Determining registration and completing confirmation of enrolment documents to authorize the release of loans and grants to students in accordance with government regulations.
   - Responding to inquiries by disseminating information to students applying for and receiving financial aid which may involve interviewing students for information, advising on complex policies and procedures, assistance with the
completion of financial aid or other award documents.

- Providing information regarding how and when to apply for aid through all sources and making suggestions to resolve problems as they arise.
- Making appropriate referrals to a Financial Aid Officer and other on campus departments, services and government agencies when an appropriate authority is necessary for resolution.
- Providing advice to students regarding options and possible consequences in the resolution of problems which could have a significant impact to a student’s education as well as have financial implications to the University (for example: Emergency Loans, Emergency Bursaries, Lift Block Requests, Tuition Deferrals).

### 2. Responsibility: Records maintenance of student enrolment and program eligibility 40%

**Duties:**

- Maintaining records and entering all forms of financial assistance in the student information system database with a high degree of accuracy.
- Requesting reports from the UVic student information system database to highlight withdrawals or unsuccessful terms.
- Compiling a current list of students requesting split enrolments and students on exchange.
- Maintaining up to date knowledge of regulations, policies and procedures for all UVic and government student assistance programs.
- Accessing government databases and portals to confirm, update and obtain student loan information.

### 3. Responsibility: Provides administrative assistance 10%

**Duties:**

- Requesting forms to keep in stock and forwarding correspondence via email and paper to Student Aid BC for processing.
- Maintaining and securing a filing system of financial aid documents in accordance with regulations outlined in the British Columbia Freedom of Information and Protection of Privacy Act (FOIPPA) and PCI Compliance.
- May be required to train or guide new employees regarding Financial Aid Assistant duties on an informal basis.

### REQUIRED QUALIFICATIONS:

**Skills:**

- Excellent interpersonal and communication skills are required to relate effectively with the University community and external contacts.
- Strong organizational skills and the proven ability to handle a high volume of in person, email and phone inquiries involving complex financial aid situations on a daily basis are required.
- Dedicated problem-solving skills with the ability to determine when a problem needs to be taken to a higher authority.
- Must be able to input records into a database or spreadsheet with a high degree of accuracy.
- Ability to work in a team environment or individually.
### Specialized Knowledge/Education:

- Have working experience with a complex Student Information System such as Banner Student or a similar database.

### Experience:

- One year of proven clerical skills in a post-secondary institution (or a similarly large and complex administrative office environment).
- Strong customer service background, including at least two years of related experience in a post-secondary, financial, government or student service environment.
- Experience answering general and complex inquiries by applying knowledge of existing policies or procedures.
- Demonstrated knowledge and experience with office software such as Word, Excel, and Outlook, as well as online information systems such as the UVic website and online portal is required.
- Prefer experience working in accordance with regulations outlined in the British Columbia Freedom of Information and Protection of Privacy Act (FOIPPA).
- Knowledge of government student aid programs or post-secondary award programs an asset.

<table>
<thead>
<tr>
<th>Employee’s Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Supervisor’s Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>