

JOB DESCRIPTION

Dept.: Student Awards and Financial
Assistance (SAFA)

Working Title: Financial Aid Assistant (130)

Date: October 2015

Job Class: 9

PRIMARY FUNCTION:

Respond to student inquiries and provide guidance and advice regarding student awards and financial assistance programs; review student applications for awards and financial assistance; process student information and data related to student awards and government financial assistance programs.

JOB DUTIES AND TASKS:

1. Respond to student inquiries, provide information and advice:

- a. Respond to student inquiries in-person, by phone and by e-mail.
- b. Advise students regarding government and KPU financial assistance program options and eligibility.
- c. Identify students in financial distress and refer for further assistance as appropriate to a Financial Aid Officer or other senior position in SAFA.
- d. Refer students for tuition fee deferrals, emergency loans and emergency bursaries.
- e. Advise students and make recommendations regarding minimum course load, the impact of withdrawal from studies, unsuccessful studies, student loan default, appeals, reassessments and other matters related to student eligibility for government financial assistance.
- f. Advise students regarding internal and external scholarship and award opportunities.
- g. Review student applications for financial assistance and awards including supporting documentation, accuracy and completeness, and taking corrective action as required.
- h. Assist student award applicants with completing internal and external forms and documentation.
- i. Represent SAFA at various KPU and external events.

2. Reporting and processing student information and data:

- a. Confirm student status and verify enrolment with government student loan authorities and agencies, with other KPU departments, and with other post-secondary institutions for the purposes of student loan and award eligibility and disbursement.
- b. Report student withdrawals and unsuccessful studies to appropriate government funding authorities and/or post-secondary institutions as required.
- c. Monitor enrolment and course completion of students in receipt of government financial assistance while participating in exchange programs (study abroad).
- d. Monitor enrolment and course completion of students in receipt of government financial assistance while pursuing split enrolment (concurrent registration at more than one post-secondary institution).
- e. Generate award and financial assistance payments to students through data entry in the student information system (Banner).
- f. Generate award notification letters and other official KPU correspondence to students.
- g. Enter, scan and file confidential information to student records in KPU's student information system.
- h. Maintain SAFA student files and records in accordance with KPU and government policies.
- i. Liaise with KPU's IT department and relevant IT subcontractors as required regarding system performance issues and reporting functions within the financial awards database.

3. Related duties:

- a. Secure cheques, award documents, government forms and student information.
- b. Prepare reports and correspondence for distribution as required.
- c. Develop financial awards forms, booklets and brochures for distribution and posting online.
- d. Maintain departmental website.
- e. Sort and distribute mail.
- f. Maintain and order office supplies including departmental documents, brochures, official government forms, Student Aid BC documents, and other student resource material.

- g. Troubleshoot office equipment such as photocopier/printer/scanner and arrange for maintenance and repairs as required.
- h. Assist with Scholarships and Awards ceremony preparations and events.
- i. Assist with compiling information for annual budget requests and other reporting.
- j. Arrange to courier documents
- k. Travel to and work at any KPU campus as required.
- l. Contributes to and promotes a safe, respectful, and inclusive work environment by adhering to University policies and procedures and completing mandatory training programs.

SUPERVISION RECEIVED:

Reports to the Manager, Student Awards & Financial Assistance

SUPERVISION/DIRECTION EXERCISED:

Provide formal direction to student assistants and auxiliary staff.

PHYSICAL ASSETS/INFORMATION MANAGEMENT:

Operate, maintain and troubleshoot various office equipment such as computers and photocopiers/printers/scanners; maintain student files and update student records in KPU's student information system; secure student files and confidential information.

FINANCIAL RESOURCES:

Disburse cheques to students; maintain supply of forms and brochures. Order office supplies; sign for the receipt of goods; check for accuracy and completeness of financial calculations on various student forms and applications.

The above statement reflects the general details considered necessary to describe and evaluate the principal functions of the job identified, and shall not be construed as a detailed description of all the work requirements that may be inherent in the job.

EMPLOYER REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:

1. A minimum 2 years of post-secondary education – bachelor's degree preferred – accompanied by a minimum of 2 years related experience in a post-secondary setting.
2. Demonstrated experience working with student awards and financial assistance programs inclusive of ABESAP/AUG, government student loans and grants.
3. Demonstrated customer service experience in a fast-paced complex setting dealing with sensitive situations calling for the use of empathy, diplomacy and tact in the delivery of information.
4. Demonstrated ability to communicate patiently and effectively with a diverse range of people and situations.
5. Excellent oral and written communication skills.
6. Demonstrated working knowledge of the Student Banner system, or a similar student records system (e.g. Colleague, PeopleSoft).
7. Proficiency with Microsoft Office (e.g. Word, Excel) at an Intermediate level.
8. Minimum of 35 wpm keyboarding skills with an error rate of less than 10%.
9. Aptitude for exacting and precise work; must be detail-oriented.
10. Excellent organizational skills, demonstrated ability to problem solve and ability to set priorities and multi-task.
11. Demonstrated ability to handle confidential information appropriately.
12. Ability to work independently, exercise good judgment and demonstrate initiative.

Revised: October 2015