



Section I

<b>Position Information</b>	Update Only <input checked="" type="checkbox"/> Classification Review <input type="checkbox"/>
<b>Position Title</b>	Intermediate Student Awards & Financial Aid Advisor (SAFA) Advisor
<b>Position #</b>	999504
<b>Department</b>	Office of the Registrar
<b>Classification Level</b>	Range 2
<b>Reports to</b>	Coordinator, Student Awards & Financial Aid
<b>Effective Date</b>	April 1, 2014
<b>Position Summary</b>  Briefly describe the main purpose(s) of the position	<p>Consistent with the policies of the University and the objectives and priorities of the Office of the Registrar, the incumbent will provide efficient and effective service to AU learners, AU staff and external partners while ensuring the integrity of the AU Student Financial Aid and Student Awards program and related processes are adhered to. Provides assistance to students and prospective students regarding policies, procedures and processes for accessing various Government financial aid programs. Provides assistance and administrative support for the operations of the AU Students Awards program, including academic scholarships, financial need bursaries and general internal and external awards.</p> <p>Expected to work with a high degree of confidentiality under minimal supervision, the incumbent must be able to determine priorities and have excellent time management skills. It is essential to be open to change and to be able to organize a heavy work load.</p>

**Duties and Responsibilities**

Organize by key responsibility area and include % of time spent where possible

**35% Student Communication & Support (SFA)**

- Provides information to students and prospective students about financial aid procedures, policies, deadlines, timelines and requirements of the Provincial funding agencies and Athabasca University.
- Assists students and prospective students with the financial aid application process, including completion of the loan study plans and Provincial information forms (either paper based or online).
- Explains and assists students with all full time requirements for financial aid purposes.
- Refers students to the Coordinator, Ombuds, Student Advisor, Counselor or the Access for Student with Disabilities office as appropriate.
- Maintains data within the system (CatchMyData) that provides support for student financial aid processes.
- Completes student loan related Confirmation of Enrolment documents. i.e. Schedule 2's. CPP forms, Studies at Another Inst, etc.
- Maintains the confidential records of all students applying for and receiving financial aid.
- Ensures that the various Provincial policies and regulations are adhered to.
- Responsible for registrations, extensions, withdrawals for funded students and ensures that various deadlines are adhered to.
- Monitors academic progress of funded students according to established parameters, so that continued funding eligibility is not negatively affected.
- Makes decisions regarding continued support for funding when students fail to demonstrate successful academic progress.

**20% Student Communication & Support (Awards)**

- Informs prospective and current students about the Athabasca University Student Awards Program and Honours Lists including policies, procedures, timelines, and criteria of awards, scholarships, and bursaries.
- Assists current and prospective students with award and scholarship application processes.
- Ensures all application forms are completed correctly.
- Responds to, and tracks student email inquiries.

**20% Administrative Responsibilities (SFA)**

- Ensures that all financial aid documents (application, confirmation of enrolment and Provincial forms) are provided to students and prospective students.
- Prepares documents for microfilming.
- Performs all procedures relating to SF Deletes, including student account reconciliation if warranted.
- Responsible for maintaining all correspondence relating to financial aid.
- Communicates policy, procedures and practices for the SF Unit to other AU Departments and Centres.
- Assist Coordinator, Associate Registrar, Registrar and/or Ombuds Office with student concerns.

- Is a member of the Alberta Student Awards and Financial Aid personnel Association (ASAPA) and Canadian Association of Student Financial Aid Administrators (CASFAA).

**25% Administrative Responsibilities (Awards)**

- Maintains records pertaining to awards, scholarships and bursaries administered by Athabasca University.
- Creates and maintains the confidential files relating to awards, scholarships, bursaries and honors lists.
- Prepares and maintains award competition files in preparation for selection committees.
- Provides support to selection committees when required.
- Generates letters of notification to recipients for awards, scholarships, bursaries and honors lists.
- Forwards student letters of thanks or appreciation to Advancement Office for Donor follow up.
- Compiles, enters and validates data to the awards database.
- Researches student records to collect and verify student information, profiles, transcripts, and award eligibility.
- Organizes and maintains all electronic files associated with awards, scholarships, bursaries and honours list (shared server/stawards).
- Prepares spreadsheets for generation of scholarship, award and bursary payments.
- Assists the Coordinator with related tasks pertaining to selection of award recipients, may include data retrieval or report generation.
- Communicates clearly and effectively with the Coordinator, and staff to ensure efficient work flow and processing.
- Manages calendaring function to track promotion & award application deadlines.
- Additional tasks assigned from time to time.

## Classification Factors

### Context and Complexity

- In order to provide accurate and complete information to students and prospective students, an up to date and thorough understanding of Alberta Innovation and Advanced Education's requirements and regulations must be achieved and maintained.
- Must have a thorough understanding and in depth knowledge of the various Provincial student aid programs.
- Required to assist students and prospective students with personal and confidential matters and maintain confidential records.
- Required to continually differentiate between advising (programs and courses) and counseling (life, employment, etc) issues and refer to appropriate personnel.
- An excellent knowledge of all Office of the Registrar policies and procedures is required.
- A considerable number of decisions in the financial aid area are demanded regarding the treatment of data in accordance with the University policies and procedures.
- A tolerance of disruption and an ability to manage time and set priorities for a heavy workload is required due to continually deal with changing procedures, to meet new needs, pressure of increasing registrations and the unpredictability of student generated issues.
- Responsible for the organization of a variety of complex work on a daily basis to ensure efficient and timely processing of documents, whether paper based or electronic, and for the accuracy and completeness of work.
- Ability to use multiple AU systems, such as, Banner, Newton, Moodle, and MS Office.
- Ability to efficiently use multiple external Government systems and Financial Aid portals. Including National Student Loan Service Centre (NSLSC).

<p><b>Work Problems</b></p>	<ul style="list-style-type: none"> <li>• Responsible for the organization of a wide variety of work on a daily, weekly and monthly basis to ensure efficient and timely processing of financial aid applications, program information forms, confirmation of enrolment and assessments, and for the accuracy and completeness of work. Includes Government online portals.</li> <li>• Effectively deals with students and prospective students who face financial barriers to post secondary education with respect, diplomacy, and professionalism.</li> <li>• Develop and maintain a complete understanding of Provincial Government financial assistance requirements and regulations.</li> <li>• Provide current and accurate information and application assistance on financial aid policies and requirements for students and prospective students across Canada.</li> <li>• Review all financial aid application processes in order to provide clarification to students.</li> <li>• Must keep current with all Office of the Registrar and University policies in order to assist or refer students and/or staff members appropriately.</li> <li>• Resolution of complaints and the handling of inquiries from students and University staff as they relate to financial aid.</li> <li>• Identify new or required changes to policies and procedures for financial aid.</li> </ul>
<p><b>Authority</b></p>	<ul style="list-style-type: none"> <li>• Responsible for authorizing all Provincial Aid agency funding approvals and related documents.</li> <li>• Full access to Government online Financial Aid Officer portals.</li> <li>• Full signing authority of Confirmation of Enrolment, Certificates of Eligibility, Form B's and Schedule 2 forms.</li> <li>• Responsible for resolving issues that may arise for financial aid applications.</li> <li>• Has authority to make decisions regarding exceptions for students outside of policies and procedures within established parameters.</li> <li>• Errors are costly in terms of denial of financial aid for students if applications are not processed in a timely fashion, could result in a loss of maintenance funding or grants for students, and could impact negatively on the University.</li> <li>• Resource person for Office of the Registrar, the learning centers, academic and support staff, all other AU departments and students with regard to financial aid application procedures.</li> <li>• Makes independent judgments and decisions regarding all financial aid matters.</li> <li>• The incumbent will have access to extremely confidential material and student information and is required to uphold the utmost degree of confidentiality.</li> </ul>

<p><b>Contacts and Communication</b></p>	<ul style="list-style-type: none"> <li>• Daily and often primary contact with students. Contact on a daily basis with tutors, course coordinators, Learner Support Services and other University staff. Contact may be in person, telephone, mail, or e-mail.</li> <li>• Regular contact with various provincial funding agencies, Alberta Innovation and Advanced Education, Student Aid Alberta, Post secondary educational institutions, various service providers and any other institutions in matters of financial aid.</li> <li>• In the absence of the Senior Financial Aid Advisor, acts as the resource person for all inquiries regarding financial aid.</li> <li>• Liaison with all Provincial funding agencies on behalf of students and Athabasca University.</li> <li>• Liaison with all service providers (National Student Loan Service Centre and Davis + Henderson, etc.) on behalf of students and Athabasca University.</li> </ul> <p><b>CONFIDENTIALITY</b></p> <p>The incumbent will have access to extremely confidential material in performing his/her duties and responsibilities. The incumbent is required to uphold the utmost degree of confidentiality and to conform to the regulations and guidelines as outlined in <b>The Athabasca University Policy Regarding the Collection, Dissemination and Confidentiality of Information Regarding Athabasca University Students</b> (as amended from time to time). Failure to comply with this policy may result in disciplinary action up to and including discharge.</p>
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**Signatures for Section I**

Incumbent's Signature \_\_\_\_\_

Date \_\_\_\_\_

Supervisor's Signature \_\_\_\_\_

Date \_\_\_\_\_

## Section II

### Qualifications

Includes education, experience, skills, abilities and any other special qualifications required. The qualifications relate to the position not the incumbent

- A 2-year diploma in administration, finance or business or other applicable designation, supplemented with 5 years of increasingly responsible experience in a post secondary, administrative, business or financial environment, or equivalent.
- Excellent interpersonal skills.
- Excellent verbal and written communication skills.
- Demonstrated attention to detail and ability to prioritize and organize varied responsibilities.
- Advanced knowledge and established skill set with MS Word, Excel, and Access.
- Knowledge of a computerized student information system and online files.
- Thorough investigative and problem solving skills are required.
- The ability to absorb and assimilate diversified information to make quick and independent decisions.

### Signatures for Sections I and II

Department Head Signature \_\_\_\_\_ Date \_\_\_\_\_

Executive Officer Signature \_\_\_\_\_ Date \_\_\_\_\_

Human Resources Review \_\_\_\_\_ Date \_\_\_\_\_