

Creation Date:	July 2015
Pay Group:	16
Page	1 of 3

CLASS SPECIFICATION

STUDENT FINANCIAL ASSISTANCE OFFICER

NATURE AND SCOPE OF WORK

This is varied administrative and customer service work in support of student financial assistance programs at the University. An incumbent in this job is primarily responsible for supporting the administration and promotion of student financial assistance programs at the University. Duties include processing forms and applications for student financial assistance and fee deferrals, preparing and delivering group information sessions, liaising with students, actively promoting student financial assistance options, maintaining a variety of files and database information. An incumbent receives direction from the Financial Aid Supervisor and reports to the Associate Registrar, Records, Registration and Financial Aid.

ILLUSTRATIVE EXAMPLES OF WORK

- Remains updated and current in policies and procedures (both internal and external) as they pertain to student financial aid assistance.
- Reviews and processes applications for various student financial assistance programs; assesses and evaluates eligibility for student financial assistance in accordance with established policies and procedures; and recommends distribution of such funds, including preparation of cheque requisitions, to the Financial Aid Supervisor and/or the Associate Registrar, Records, Registration and Financial Aid.
- Creates and organizes promotional and information materials for presentations and workshops for student financial assistance options, delivers presentations and workshops to students and the University community both on and off campus, including regional Capilano University campuses.
- Provides information and resources to students and the University community regarding various student financial assistance options
- Under the guidance of the Financial Aid Supervisor, develops and implements methods to continuously promote student financial assistance options (both internal and external) to students and departments; actively communicates and liaises with students and the University community
- Under the guidance of the Financial Aid Supervisor, determines the eligibility of fee deferral applications; enters applications and status into database and communicates with students as required.

- Prepares and/or produces a variety of material from general instruction including correspondence, spreadsheets, presentations, reports; supports communication to students, the university community and external stakeholders.
- Provides support for the processing of various student financial assistance programs, including coordinating and communicating information to departments, retrieving and reviewing information from files, updating and maintaining database information, and notifying students.
- Creates and maintains a variety of departmental records including files, lists, and application records; prepares reports/documentation on same
- May be required to take training and act in the capacity of a floor warden as part of the University's Emergency Preparedness Plan (Fire, WHMIS, Earthquake).
- Performs duties related to the qualifications and requirements of the position.

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS

- Considerable knowledge of financial aid programs, eligibility requirements and procedures.
- Considerable knowledge of the rules and regulations governing the forms of aid administered by the University.
- Considerable knowledge of the application of freedom of information and protection of privacy provisions to the operations of the department
- Considerable knowledge of word processing, spreadsheet, and presentation applications.
- Considerable knowledge of business English, spelling and arithmetic.
- Considerable knowledge of office practices and procedures.
- Ability to be detail-oriented and to keep accurate records and archives.
- Ability to effectively communicate accurate information on a one-to-one basis or to groups of a varying size and to address large or small groups in formal or informal settings.
- Ability to address large or small groups fluently and enthusiastically in formal and informal settings.
- Ability to organize and conduct workshops and open lab sessions.
- Ability to multitask, apply organizational skills in order to meet deadlines, and work with minimal supervision.
- Ability to take responsibility for completion and follow through of goals and tasks.
- Ability to adapt to changing situations and reprioritize tasks smoothly.
- Ability to provide a high level of customer service by courteously and accurately providing information to University employees, students, external contacts, community groups, and the general public.

- Ability to maintain confidentiality and to exercise tact, diplomacy, discretion and sensitivity in directing applicants for financial aid and when working with other employees, students, community groups, and the general public.
- Ability to carry out research assignments and to assist in assembling and organizing information obtained from a variety of sources.
- Ability to understand the context of issues in order to exercise initiative and judgement regarding action required.
- Ability to understand and follow complex oral and written instructions, and communicate information effectively, both orally and in writing.
- Ability to draft correspondence and reports from general instructions, appropriate to the intended audience with correct emphasis and tone.
- Ability to establish and maintain effective working relationships with other employees, students, community groups, and the general public.
- Ability to learn in-house and other software applications and to apply technical knowledge.

REQUIRED TRAINING AND EXPERIENCE

- Completion of a two-year diploma (minimum 60 credits).
- Two years of experience in an administrative role, preference in an educational setting with significant contact with students, faculty, and the public.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS

- None.