

**Job Class Profile:** Appeals Officer

**Pay Level:** CG-30 **Point Band:** 676-689

Factor	Knowledge	Interpersonal Skills	Physical Effort	Concentration	Complexity	Accountability & Decision Making	Impact	Development and Leadership	Environmental Working Conditions	Total Points
Rating	5	4	2	4	4	5	4	1	2	
Points	233	67	13	19	120	108	83	21	21	685

## JOB SUMMARY

The Appeals Officer is specialized work in the review and analysis of appeals from applicants for student financial assistance involving loans and grants. Position ensures that students receive a fair and reasonable review of their concerns relating to their student loan eligibility.

### Key and Periodic Activities

- Reviews written requests appealing a decision of the student aid office to determine whether there are sufficient grounds to justify a claim. May have to advise appellant that request is denied based on review.
- Uses discretionary decision making authority to make adjustments to the level of assistance where there are sufficient grounds to justify the request.
- Contacts students to discuss the specifics of their case or the student aid process.
- Consults with other divisional members relating to policies and procedures required to complete work, address issues and resolve problems relating to the review of an appeal.
- Conducts information sessions for new divisional staff relating to the appeal process.
- Prepares and presents cases to the external Student Aid Appeals Board (provides policy interpretation /clarification if needed and documents Board decisions and ensures all follow up is conducted).
- Recommends revisions to student aid policies and procedures based on situations that arise during the regular review and analysis of an appeal request.
- Reviews Student Loan Guide and Application for accuracy prior to the start of each academic year.
- Performs related work as requested by Manager/Director (i.e. project work).

## SKILL

### Knowledge

#### General and Specific Knowledge:

- Provincial and Federal Student Loan programs.

#### Formal Education and/or Certification(s):

— Minimum: Undergraduate Degree in Business.

**Years of Experience:**

— Minimum: 2 -3 years.

**Competencies:**

- Follows documented procedures and tasks to achieve outcomes.
- Proof reads, edits and formats a variety of documents (i.e. Briefing Notes).
- Writes simple letters, memos and other documentation.
- Strong analytical skills.
- Uses various computer software programs such as spreadsheets, word processors, databases, and the Student Aid Management System.

**Interpersonal Skills**

- A range of interpersonal skills are used to perform activities such as listening to information, asking questions to get information, providing routine information and direction, and gaining the co-operation of others.
- Communication occurs with employees within the immediate work area, supervisors/managers, students, and the general public on a daily basis. Interactions include students submitting information either written or verbal regarding an appeal, gaining the co-operation of staff, and communicating appeal decisions to the relevant parties involved (i.e. students, supervisors, etc.)

## EFFORT

**Physical Effort**

- Work demands do not result in fatigue requiring periods of rest.
- There is no requirement to lift or move objects.
- Work provides the opportunity to occasionally stand and walk within the office environment.
- Constant fine finger/precision work and sitting to perform majority of tasks is required.

**Concentration**

- **Visual** concentration is constant while performing computer work for extended periods of time.
- **Auditory** concentration is constant when interacting with students and others regarding a student aid appeal either in person or over the phone.
- Works tasks such as reviewing application for student loan, requires **alertness** to ensure all factors are considered in decision-making.
- **Time pressures, deadlines and lack of control over work pace** are experienced due to workload volume and appeal application timelines.

**Complexity**

- Work typically involves a series of tasks and activities that are quite different but allow the use of similar skills and knowledge.
- Problems/challenges can usually be addressed by following procedures or guidelines (constantly).
- The most typical challenge or issue is policy interpretation based on the student's individual circumstances.

- Policies, procedures and guidelines exist to assist and address issues and challenges (i.e. Student Loan Manual, Federal/Provincial acts and regulations).

## RESPONSIBILITY

### Accountability and Decision-Making

- Work tasks and activities are generally not prescribed nor controlled.
- Decisions can be made when increasing the assistance received where evidence warrants.
- Requires approval in situations where clarification on regulations or policies is necessary.
- Work tasks involving the interpretation of acts, regulations, or policy (Federal and/or Provincial) are completed at the independent discretion and judgment of the class.

### Impact

- Impacts generally affect immediate work area, department/group, and the general public (i.e. an aggrieved student may contact the Department or MHA regarding the outcome of the appeal).
- Impacts are felt directly on processes and systems, information, and finances (i.e. student loan amounts).
- The most significant impacts are on students.
- Consequences of errors are usually identified within one month, the length of time for the appeal process to be completed. Consequences of the errors could result in a student not receiving any assistance and having to withdraw from their academic program of study.
- Legislation, policies, and procedures are in place to guide the appeal process.

### Development and Leadership of Others

- Not responsible for the supervision of staff.
- May be required to provide orientation to new employees and act as a technical resource for the Appeal Process.

## WORKING CONDITIONS

### Environmental Working Conditions

- There is no requirement for any special precautions or safety equipment.
- May work in an environment where unusual/distracting noise and glare from computer monitors is experienced.