Job Class Profile: Appeals Officer

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

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<th>Factor</th>
<th>Knowledge</th>
<th>Interpersonal Skills</th>
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<th>Impact</th>
<th>Development and Leadership</th>
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JOBSUMMARY

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.