PART I: JOB DESCRIPTION

Weighted Job Questionnaire (WJQ) Custom

Department Name: Student & Registrar Services, SFU Surrey

Position Number(s): 99534

Current Position Classification: Clerk, grade 7

Department's Position Title: Information Assistant

Evaluating Supervisor's Name:

Evaluating Supervisor's Position Title: Associate Director, Student & Registrar Services, SFU Surrey

Today's Date: January 6, 2005
Revised: October 13, 2006

Part I is being completed by: Please check one: Employee ___ Evaluating Supervisor X ___
SIMON FRASER UNIVERSITY
&
C.U.P.E., Local 3338

JOB DESCRIPTION

1. POSITION IDENTIFICATION

Department Position Title: Information Assistant
Department Name/Section: Student & Registrar Services SFU Surrey
Total Number of Positions Covered by this Description: One
Position Number(s): 99534
Evaluating Supervisor
Position Title: Associate Director, Student & Registrar Services SFU Surrey

For Use by Human Resources Only

Classification & Grade Approved:

________________________________________

Effective Date: ________________
Approved by: ________________
Next Review: ________________

2. POSITION SUMMARY (Briefly describe the overall purpose of the position)

The Information Assistant acts as first contact for patrons at the Student & Registrar Services Office and the campus at SFU Surrey. In accordance with University and government policies and office procedures, responds to diverse and specific enquiries regarding: educational programs and services; admissions to graduate and undergraduate programs; student records; financial assistance programs and services; scholarships; and status of student accounts. Receives and processes payments for tuition and other services and materials supplied through Student Services. Receives and processes a wide variety of forms relating to admissions, government student loan programs, and bursaries/scholarships. Maintains accurate student records and issues official documentation. Acts on behalf of Finance to process campus departmental deposits.
3. MAJOR FUNCTIONS (List the duties and responsibilities of the position in order of frequency, i.e. (D) Daily; (W) Weekly; (M) Monthly; and (S) Semester)

(D) In accordance with University and government policies and office procedures, responds to diverse and specific inquiries regarding: educational programs and services; admissions to graduate and undergraduate programs; student records; financial assistance programs and services; scholarships; and the status of student accounts.

(D) Assesses situations and provides appropriate information or guidance to students, the general public. Anticipates and clarifies further procedures and processes that students, the general public, and university personnel need to pursue. Resolves problems when appropriate or, if required, refers matters requiring advising assistance to a Student Services General Academic Advisor or Department Program Advisor located at the SFU Surrey campus, or a Financial Assistance Advisor located at the Burnaby Campus. Contacts other University departments or external agencies to resolve problems and determines when students need to be referred to other University departments or external agencies.

(D) Receives and processes a wide variety of forms relating to admission, re-admission, records, and registration in credit and non-credit programs, government student loan programs, and bursaries/scholarships.

(D) Maintains accurate student records and issues official documentation. Enters and/or updates information on the student admissions and records. Processes add/drop of courses and manually adjusts students’ academic and financial records. Provides and processes confirmation of enrollment forms and letters as well as other forms of verification that may be required by students.

(D) Reviews and processes a variety of forms, letters, etc., for government student loan programs and other external award and financing agencies. Receives and processes bursary and private scholarship applications. Screens applications for errors or inconsistencies that may require intervention at a higher level (e.g., missing information versus fraudulent information). Releases scholarship cheques.

(D) Receives payments for tuition and other services and materials supplied through Student Services. Posts payments and/or deferrals against students’ accounts. Receives and processes requests for payroll deduction, tuition waivers, tuition credits, and tuition fee assessments. Receives requests for refunds and releases refund cheques to students.

(D) Receives and processes deposit transactions for various SFU Surrey departmental accounts. Processes various financial forms for re-distribution of payments to proper departmental accounts. Processes and reimburses petty cash payments for various departmental purchases.

(D) Acts on behalf of Finance to process campus departmental deposits. Balances and prepares departmental deposits at the end of the work shift. Identifies and investigates errors and discrepancies for review with supervisor. Makes appropriate corrections and adjustments to deposits.

(D) Keeps abreast of new information relating to educational programs, financial assistance, and student accounts. Monitors changes in regulations and policies for government administered loan and grant programs for all provincial jurisdictions and external agencies as well as University policies for all scholarship, award and bursary programs and must organize the information accordingly.

(D) Prepares the office to open for the day. This function includes: opening the safe, making change and preparing the cash float for Department and unlocking drawers and front gate. Further duties include turning on computers, printers, lights, and checking the phones for messages.
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Position Numbers 99534

(D) Prepares the office to close for the day. This function includes: locking the front gate, cabinets and safe, turning off computers, printers and lights, sorting mail, closing the SIMS cashier’s office, and ensuring deposit is properly secured.

(D) Maintains information display areas ensuring displayed information is up-to-date and accurate. Keeps an inventory of all supplies and ensures that all required supplies are available in sufficient quantities. Keeps the office in an organized and presentable state.

(S) Issues and/or validates U-pass cards for eligible students, faculty and staff based on a knowledge of U-pass card policy regarding eligibility and the corresponding security and service access. Operates the photo imaging and card printing equipment to produce the U-pass cards. Assists in monitoring an inventory of U-pass card supplies and maintaining equipment to meet service requirements.

(S) Moves, lifts and carries supplies and equipment associated with the set-up and take down of the temporary ID/Library card production temporary location. Sets-up stanchions for line-up controls; easels, boards, etc., as required for information displays and other special events.

(S) Assigns and checks the work of a group of up to two temporary staff during the mass card production periods at the beginning of the Fall semester. Trains the temporary staff in the production and distribution of ID/Library cards. Sets-up, tests, and ensures the proper maintenance of the Photo/ID equipment and ID production facility. Maintains and tracks inventory of supplies. Maintains tracking statistics and compiles the information to assist with inventory control and resource planning.

(S) Issues and/or validats U-pass cards for eligible students, faculty and staff based on a knowledge of U-pass card policy regarding eligibility and the corresponding security and service access. Operates the photo imaging and card printing equipment to produce the U-pass cards. Assists in monitoring an inventory of U-pass card supplies and maintaining equipment to meet service requirements.

(S) Assists in processing of recreation services memberships for SFU Surrey community (eligible students, staff and faculty) on behalf of Recreation Services and Athletics

(S) Liaises with various campus departments including academic program offices and the Student Services Offices on the Burnaby and Vancouver campuses. Maintains a reference file on updates and changes in related polices and procedures.

(S) Monitors efficient functioning of equipment including laser printers, photocopying equipment, computers, Photo ID unit, U-pass unit, Facsimile machine. Reports malfunctions to the supervisor, or approved service contractor to ensure that necessary repairs and /or servicing work is done in accordance with established maintenance schedules/protocols.

(S) Assists in processing of recreation services memberships for SFU Surrey community (eligible students, staff and faculty) on behalf of Recreation Services and Athletics

4. MINOR FUNCTIONS (List duties and responsibilities that occur annually and periodically throughout the year)

Performs general clerical duties such as filing and preparing and distributing mail outs for other campus student service departments and academic departments when requested.

Required to attend workshops and training sessions conducted by SFU staff and/or government staff on and off campus.

Marking down appointments for part-time HCCC Personal Counselor.
5. LEVEL OF INDEPENDENCE  (Check one box that best describes the level of independence that can be exercised within the position by a fully trained employee.)

(a) ___ Work is provided with specific instructions describing how and when it should be completed.

(b) ___ Work is provided with general instructions. The employee makes choices about how the work will be completed within deadlines.

(c) ___ Work is self-directed by the employee. The employee determines what work needs to be completed and when it should be completed to meet deadlines.

(d) ___ Work is assigned on a project-by-project basis in the form of broad objectives. The employee evaluates what work needs to be completed within general time frames. Provide examples of project work:

6. TRAINING EXERCISED  (If the position provides training, check each description that applies)

(a) ___ Not required to provide training to other individuals.

(b) ___ Explains how work is performed in his/her own position to individuals in other positions performing the same similar work (includes training replacement employees).

(c) ___ Provides one-on-one specialized training to other individuals. Considered a specialist in a particular area or field of study. Positions at this level may be designated as the resident department expert.

(d) ___ Provides one-on-one training to individuals in other positions. Must have a good understanding of the work of the other positions. Positions at this level may be designated as group leaders or work leaders.

(e) ___ Conducts training seminars for groups. Training seminars are normally scheduled and follow a prescribed format. May also develop or assist in the development of training seminars.

7. DIRECTION EXERCISED  (Check each description that applies)

(a) ___ Not required to provide direction to other individuals.

(b) ___ Assigns and/or checks work of other individuals.

(c) ___ Schedules, assigns and checks work of other individuals.

(d) ___ In addition to C., establishes work priorities for a unit.

(e) ___ In addition to C. and D., guides project teams.

8. INTERNAL AND EXTERNAL CONTACTS  (List internal and external contacts (i.e. specific positions within own department, other departments; students; faculty; on/off campus vendors; etc.), the duration of each contact (i.e. less than 1 hour at a time; 1-2 hours at a time; more than 2 hours at a time) and the frequency of each contact (occasional; frequent; continuous).

<table>
<thead>
<tr>
<th>Type of Contact</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>General Public</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
</tbody>
</table>
Information Assistant, Student and Registrar Services, SFU Surrey
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Academic/Program Advisors <1 hour Frequent
Associate Director, Student and Registrar Services <1 hour Frequent
Admissions/Records Clerks <1 hour Frequent
Student Accounts Clerks <1 hour Frequent
SFU Surrey Service and Academic Departments/Library <1 hour Frequent
Awards Assistants I and II <1 hour Occasional
SFU Burnaby Service and Academic Departments/Library/Admissions <1 hour Occasional
Withdrawals Office <1 hour Occasional
UPass Office <1 hour Occasional
Systems Support Staff <1 hour Occasional
External Agencies: e.g., Scholarship and Employment agencies <1 hour Occasional

9. IMPACT OF ERRORS

Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work:

- Misspelling names-addresses when providing official documentation.
- Booking appointments with incorrect advisors.
- Entering data (payment transactions, fee penalties, and add/drop refunds and penalties) into the SIMS incorrectly.

Uncommon Errors: Provide a few examples of the most uncommon errors which infrequently occur in the performance of the work:

- Giving out inaccurate information regarding University policies/programs.
- Processing payment transactions incorrectly, e.g., incorrect change, transaction data entered incorrectly in SIMS, etc.
- Adding/Dropping students from wrong course
- Inappropriately providing confidential information regarding a student

10. EFFORT (Describe concentrated periods of auditory, (hearing/listening); visual (seeing); perceptual (understanding/comprehending) and physical dexterity (finger/hand movements, eye/hand coordination, lifting, carrying, pushing, pulling, reaching, etc.). For each example of effort, indicate the concentrated duration (less than 1 hour at a time; 1-2 hours at a time; more than 2 hours at a time) and frequency (occasional, frequent, continuous).

<table>
<thead>
<tr>
<th>Type of Effort</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answering telephone inquiries (hearing/perceiving)</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Answering in person inquiries (reading/hearing/perceiving)</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Working on video display terminal (seeing/perceiving)</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Document/Form processing (perceiving/seeing)</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Reading Instructions, policies, forms, letters, etc.</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Data Entry</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Non-confined sitting</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Walking</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Non-confined standing</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Physical and/or Dexterity - typing</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Lifting supplies and equipment associated with card production</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
</tbody>
</table>
11. WORKING CONDITIONS

(a). Describe the place(s) in which work is performed such as office environment; laboratory; outside work site; etc. Also identify the number of hours (of the total hours worked per week) spent in the place(s).

<table>
<thead>
<tr>
<th>Location</th>
<th>Hours spent as a total of hours worked per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Office</td>
<td>17.5 hours per week</td>
</tr>
</tbody>
</table>

(b). Describe any uncomfortable and/or distracting conditions in the work place(s) which an incumbent is exposed to on a regular basis and the frequency of the exposure. (e.g. interruptions, distracting noise, unpleasant odors, dust, drafts, inks, dyes, cleaning agents, toner for printers, temperature extremes, heavy dust conditions, wetness, fumes, vibrations, etc.)

<table>
<thead>
<tr>
<th>Uncomfortable conditions</th>
<th>Frequency of exposure - occasional, frequent, or continuous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interruptions</td>
<td>Frequent</td>
</tr>
<tr>
<td>Noise</td>
<td>Frequent</td>
</tr>
<tr>
<td>Odors</td>
<td>Occasional</td>
</tr>
<tr>
<td>Printer and copier toners</td>
<td>Frequent</td>
</tr>
<tr>
<td>Cold/Drafts</td>
<td>Occasional</td>
</tr>
</tbody>
</table>

(c). Describe any potential health or safety hazards, etc., and the frequency of exposure of each hazard. (e.g. dealing with complaints and/or verbal/physical abuse, noise levels that interfere with normal speech/hearing, toxic gases or materials, dangerous chemicals, combustibles, radioactive material, repetitive arm, finger, wrist movements or other activities that may result in a physical injury, high speed, pressurized equipment, high voltage, heights above five feet, and bio-hazardous wastes, body fluids, etc.)

<table>
<thead>
<tr>
<th>Potential health or safety hazards</th>
<th>Frequency of exposure - occasional, frequent, or continuous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verbal Abuse</td>
<td>Occasional</td>
</tr>
<tr>
<td>Physical Threat/Abuse</td>
<td>Occasional</td>
</tr>
<tr>
<td>Robbery/Theft</td>
<td>Occasional</td>
</tr>
<tr>
<td>Exposure to people sneezing/coughing</td>
<td>Occasional</td>
</tr>
</tbody>
</table>

12. CONTINUING EDUCATION  (Check each description that applies.)

(a) ____ Does not require any continuing education.

(b) X Requires learning new university/department related procedures and/or methods.

(c) X Requires learning new procedures and/or methods acquired through reading non-university/department publications.

(d) ____ In addition to B. and C., requires registration in formal seminars, training sessions, workshops, conferences, etc.

(e) ____ In addition to B., C. and D., requires registration in post-secondary courses (one semester/equivalent).
13. QUALIFICATIONS  (Minimum required to satisfactorily perform the work)

Formal education qualifications:  (Identify the highest level of formal schooling required)

High school graduation and general courses or training of moderate duration (one semester equivalent) including word processing, database and spreadsheet applications, and office practices.

In addition to formal education, identify the certificate or program of study required:

None

In addition to the above qualifications, the number of years of minimum experience are:

Three years of related experience, including experience processing large volumes of cash/debit and credit card transactions, balancing receipts, providing customer service and using database applications.

Check one:

X  An equivalent combination of formal education, certificate/program of study and experience is acceptable.

_____ An equivalent combination of education, certificate/program of study and experience is not acceptable because: (please explain)

Occupational Skill(s):

Identify skills specifically required to perform the work of the position.

Good knowledge of University undergraduate, graduate, and non-credit programs, policies, regulations, and procedures
Basic knowledge of University financial aid programs and some external funding agencies
55 words per minute keyboarding speed with a high degree of accuracy
Excellent oral, written, and interpersonal communication skills
Excellent customer service skills
Excellent organizational skills
Excellent analytical, reasoning and problem solving skills
Ability to use database, email, web browsers, spreadsheet and word processing applications (e.g., SIMS, FileMaker, Microsoft Word, Excel, Outlook) in a PC environment at an intermediate level
Ability to exercise mature judgment and initiative
Ability to handle confidential and sensitive material with discretion
Ability to perform a large volume of payment transactions, handle large volumes of cash, and balance receipts with a high degree of accuracy
Ability to perform arithmetic calculations (adding, subtracting, multiplying, dividing, and calculating percentages) with a high degree of accuracy
Ability to work under pressure and to deadlines
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Position Numbers 99534

Occupational Requirement(s):

Identify non-skill requirements to perform the work such as ability to work shifts and/or be on-call; ability to travel periodically outside the lower mainland; have a valid driver’s license; ability to lift, move, or carry equipment or materials over 10 kg; etc.

Ability to work flexible shifts including evening hours
Ability to lift up to 10 kg.
Ability to work in a campus setting within the Central City Mall
Must be bondable

14. APPROVAL AND REVIEW

EVALUATING SUPERVISOR APPROVAL

(Information provided in the job description accurately reflects the requirements of the position)

___________________________________  ______________________________________
Name of Evaluating Supervisor  Signature of Evaluating Supervisor

______________________________________
Date

EMPLOYEE REVIEW

(I have read and understand the requirements of the position)

______________________________________  ______________________________________
Name of Employee  Signature of Employee

______________________________________
Date