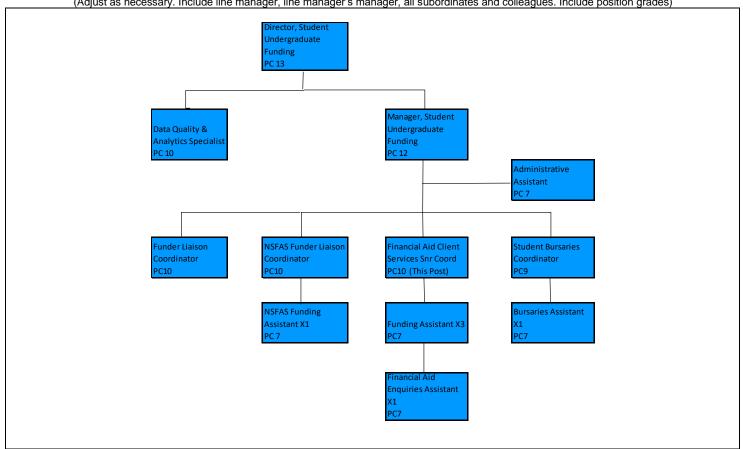| HR191	**POSITION DESCRIPTION**	UNIVERSITY OF CAPE TOWN IYUNIVESITHI YASEKAPA · UNIVERSITEIT VAN KAAPSTAD

NOTES
- Forms must be downloaded from the UCT website: http://forms.uct.ac.za/forms.htm
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Financial Aid Client Services Snr Coordinator		
Job title (HR Practitioner to provide)	Student Support Manager		
Position grade (if known)	10	Date last graded (if known)	October 2020
Academic faculty / PASS department	Student Affairs		
Academic department / PASS unit	Student Financial Aid		
Division / section	Student Financial Aid		
Date of compilation	10 September 2020		

ORGANOGRAM
(Adjust as necessary. Include line manager, line manager's manager, all subordinates and colleagues. Include position grades)

PURPOSE

The main purpose of this position is to manage the Student Financial Aid client interface platforms, ensure the accurate and timely provision of information and advice within policy parameters, manage applications and follow-up, payment of allowances to qualifying financial aid students, whilst ensuring the proper control of all documentation received.

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)

1	Manage Eligibility for financial assistance	35	1. Application management
			  a. Manage the applications and processing for non-NSFAS funded students according to policy
			  b. Ensure application form is updated annually and disseminated to qualifying applicants
			  c. Ensure update of the financial aid information for the new application cycle in the required admissions documents and application platform
			2. NSFAS Eligibility
			  a. Update the financial eligibility of applicants and registered students from the NSFAS integration and funding lists
			  b. Ensure necessary governance and controls in place for auditing of data loaded
			3. Student Communication
			  a. Keep all student letters updated annually on the system following governance sign-off for changes/edits
			  b. Send out relevant communication to students in accordance with the funding cycle, these include;
			    i. Eligible for financial aid/NSFAS funding
			    ii. Gap funding eligible
			    iii. Excessive time
			    iv. Final Year of funding
			    v. Successful and unsuccessful third term applications
			4. NSFAS Late applications
			  a. Manage the process and track through to funding application decision for late NSFAS applicants
			  b. Ensure the necessary systems and documentation are in place for the process
			5. Applicant/student communication
			  a. Process reminders for applicants to apply for NSFAS when the NSFAS application cycle opens
			  b. Implement and maintain a system update of outstanding documents and communication to students and track resolution (Checklist)
			    i. Manage the collection and forwarding of outstanding NSFAS applicant documents
			    ii. Follow-up on unresolved documentation
			    iii. Close student case, and update funding status with relevant student communication
			  c. Keep applicant and student's communication (letters) updated for annual funding cycle
			  d. Manage the process of students receive timely Vula communication relating to the SFA processing cycles
			    i. Ensure sign-off of communication by Manager
			  e. Ensure all funded students receive the correct funding letters for their funding status
			6. Application cycle processes (nightlies; Run the nightly processes for the opening of the Admission cycle until end December and handover to relevant SFA line management.
				1. Applicants and students are abreast of funding application requirements
				2. Necessary systems are implemented to manage the application process
				3. Students are accurately advised of their funding status
				4. Late applications are managed to closure
				5. NSFAS funding is maximized by ensuring proper management and follow-up of outstanding documents
				6. Financial aid reports are run and managed to ensure accuracy of financial aid information
				7. All student communication channels are kept up to date
				8. Management of the Appeals process for change of programme
				9. Monitor reports to ensure accuracy of funded students in accordance with policy

			7. Financial Aid Reports monitoring and corrections
			    a. Monitor late registration of students and correct their funding status accurately keeping records for auditing
			    b. Monitor and report on Student accommodation types and outcome of requests
			    c. Monitor reports for changes to programme of study that was not approved and take appropriate action
			    d. Monitor reports for students on final year of funding and apply the relevant user edit message to ensure student is not funded in subsequent year in accordance with policy
			    e. Monitor new functional reports developed that impact on the accurate provision of financial aid, as they affect funding status of students.
			    f. Provide accurate reports to stakeholders as required
			8. Provide the Manager with Monthly management reports on the operational unit.
			9. Manage the appeals process for change to programme of study requests
			    a. Ensure forms have all the required information
			    b. Convene a Programme Change Request Committee to consider requests
			    c. Prepare an Agenda and Minutes to record decisions
			    d. Inform students of the outcome of their appeal	

2	Client Interface and Service Management	30	1. Front Desk
			    a. Ensure that the front desk is always appropriately resourced for telephonic and face to face contact
			    b. Identify trends in client enquiries to address information/communication gaps
			2. Emails
			    a. Responsible for FinancialAid@uct.ac.za email account responses
			    b. Ensure a client focused turnaround time to email account enquiries, based on operational cycle demands
			    c. Identify trends in email communication and address information/communication gaps
			3. Provide the SFA Manager with proposed updates to the SFA website information for each funding cycle
			4. Manage the Information and resourcing of Open Day events
			5. Manage the Information and resourcing of Parent Orientation
			6. Present SFA at Open Day and Parent Orientation Planning meetings
				1. A responsive client interface and service
				2. Proper resourcing (staff and information) of the front desk
				3. All emails are responded to within reasonable times set depending on the operational cycle
				4. Information for current and prospective clients is updated and disseminated accordingly within policy parameters
				5. Trends are identified and addressed

3	Accommodation Management	5	1. Manage the requests and process request for off campus accommodation in accordance with policy 2. Monitor to ensure that Student residence information is accurate for students on the financial aid programmes (FTE information) 3. Ensure students accommodation type under Student Housing is correctly maintained 4. Ensure that a up to date and accurate landlord database is maintained annually 5. Liaise with Off Campus Student Accommodation Service to ensure that financial aid policy is understood, and information is available for prospective lessors and lessees 6. Keep all documentation, information and system interface up to date for each funding cycle	1. Requests processed in accordance with policy 2. Students correctly funded 3. Landlord database available on request in keeping with National Policy 4. Stakeholder engagement 5. Up to date information to clients

4	Allowances management	10	1. Prepare the bulk monthly allowances payments for financial aid students for final approval and ensure that allowances for payment are accurate/correct and within the policy.
			 2. Ensure all students allowance payments are up to date as funding is approved
			 3. Manage the payment of allowances based on their registration; annual, 1st semester only and 2nd semester only registration
			 4. Process adhoc allowance payment requests for financial aid students
			 5. Manage a refund request process ensuring approvals within policy parameters
			      a. Set up a bi-weekly refund approvals committee
			      b. Inform students of outcome of refund request with appropriate reasons
				1. Accurate disbursement of allowances within policy parameters
				 2. Functioning refunds committee
				 3. Up to date payment of allowances to eligible students

5	Document Management System	10	1. Implement and maintain a record management protocol for all documents received from clients 2. Implement and maintain a document management and retrieval system 3. Identify electronic document management systems for implementation to streamline document retrieval 4. Implement and maintain an appropriate workflow for incoming documentation 5. Ensure document management process is resourced to keep information up to date	1. Document management system is in place and up to date 2. Easy identification and easy retrieval of various document types
6	People Management	10	1. Staff management in accordance with HR policies and directives 2. Ensure that operational area is always properly resourced 3. Ensure that staff are properly trained for each operational cycle to ensure accurate provision of information and advice 4. Facilitate staff development in accordance with operational needs as operational requirements change 5. Ensure staff are cross functionally trained to ensure continuity of service 6. Ensure regular team unit meetings to identify issues, trends and training gaps for resolution 7. Ensure operational team is abreast of operational developments and changes to filter through to for accurate provision of information and advice clients	1. All HR polices and directives are complied with 2. Ensure Staff discipline is maintained with HR policies 3. Staff are fully trained and functional to meet operational requirements 4. Ensure cross functional training of staff to ensure resourcing needs are always met 5. Manage staff leave to ensure client requirements are met

Minimum qualifications	NQF 7			
Minimum experience (type and years)	5 years relevant work experience leading and managing a team			
Skills	Analytical thinking and ability to problem solve Effective written and verbal communications skills Proven ability to plan, organize and prioritise High level of attention to detail Experience working on a large ERP system in a large organisation High level of proficiency in the use of MS Office with a focus on MS Excel at an intermediate or advanced level			
Knowledge	University Student systems experience would be advantageous Knowledge of the national funding environment would be advantageous			
Professional registration or license requirements	N/A			
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Honesty to handle cash or finances'.)	Driven by high values and integrity Ability to work with minimal supervision Honesty to handle cash or finances			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Information Management	2/3	Problem solving	2
	Communication	2	Teamwork	2
	Professional knowledge and Skill	3	Planning & Organising	3
	Analytical skills	2/3	Creativity and Innovation	3

SCOPE OF RESPONSIBILITY

Functions responsible for	Application and eligibility management, client interfaces, allowance payments and client communication
Amount and kind of supervision received	Average
Amount and kind of supervision exercised	Daily supervision of staff
Decisions which can be made	Decisions within policy parameters
Decisions which must be referred	Fraud, suspected fraud, capex requirements, operational expenses, final content of all formal communication (letters, Vula, website, presentations)

CONTACTS AND RELATIONSHIPS

Internal to UCT	Admissions, Student records, Student Housing, Faculties, Student Fees, Students, SRC
External to UCT	NSFAS, applicants, parents,