

Update

Ministry

Advanced Education

Describe: Basic Job Details

Position

Position ID

Position Name (30 characters)

Client Resolution Specialist

Current Class

Program Services 2

Job Focus

Supervisory Level

Operations/Program

00 - No Supervision

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

Employee

Employee Name (or Vacant)

Organizational Structure

Division, Branch/Unit

PCCSA/Student Financial Services

☐ Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

Design: Identify Job Duties and Value

Changes Since Last Reviewed

Date yyyy-mm-dd

Responsibilities Added:

Responsibilities Removed:

Job Purpose and Organizational Context

Why the job exists:

The Client Resolution Specialist plays an integral role in Alberta Student Aid's program delivery. This position resolves escalated client issues and provides consultative advice and expertise to service delivery partners, clients, and internal and external stakeholders to ensure consistent interpretation of Alberta Student Aid's legislation, regulations, policies, and programs.

The Specialist takes ownership of escalated issues and follows them through to their resolution. This includes interpreting and applying applicable legislation, regulations, and policies, and directing the actions of other business units to resolve the issues in a timely and consistent manner. Escalated issues are identified in one of several ways, including: through the Alberta Student Aid Service Centre; via educational institution representatives; through Action Requests from the ADM, DM, or Minister's office; from other business units within Alberta Student Aid; or through referral from other Government of Alberta ministries.

The Specialist tracks issues over time to identify trends and makes proactive recommendations that can affect the decision making of senior management and directors as well as program policy or operational process, to prevent issues from recurring. This requires comprehensive understanding of the front-line impacts caused by changes to policy, procedure, legislation, and regulations.

All incoming correspondence to the branch is reviewed by this position to determine action required, to contact the client when further information is required, and to route the correspondence to the most appropriate unit to identify escalated issues coming in through correspondence, and to act in a proactive manner to prevent further escalation to the Action Request level when possible.

The position reports to the Supervisor, Client Resolution Unit, and works within the existing relevant policies and procedures within Alberta Student Aid and the ministry/GOA.

Responsibilities

Job outcomes (4-6 core results), and for each outcome, 4-6 corresponding activities:

Complex client issues referred to the unit from multiple stakeholders are resolved within the framework of existing policy.

- Clarify the nature of issues, concerns, or complaints received from multiple sources (e.g., directly from clients, escalated via a third-party service provider (Alberta Student Aid Service Centre (ASASC) and National Student Loan Service Centre (NSLSC)), post-secondary institutions, department executives).
- Investigate, research, and analyze each client issue, including detailed file reviews, consultation with internal or external stakeholders, review other responses prepared by sector representatives, or communication with the student or institution for additional information.
- Identify new information or changes to student / client circumstances contained in correspondence or appeal submissions and determine whether situations warrant re-assessment, request for review, or other action based on thorough investigation of circumstances.
- Identify the best resolution strategy based on research, related factors, and interpretation of existing legislation and policies and direct other business units accordingly.
- Respond directly to clients, and other relevant parties to communicate and enact the resolution strategy; this includes requesting action by staff in other units to resolve the issue.

All client issues are tracked and monitored to ensure timely and complete response.

- Track each issue to completion to ensure the appropriate action has been taken and an appropriate response has been provided to the student.
- Maintain communication with the student or referral source throughout the issue resolution process.
- Maintain issue logs and review regularly to identify recurring issues that could benefit from improvement efforts
- Identify trends observed in one's caseload that might impact operational or strategic policy (e.g., several calls are coming from a particular client subgroup reporting similar issues) for the Supervisor to take forward for review and action.

Quality assurance and improvement of processes and policies yield the highest level of service provided to students and other stakeholders.

- Review and triage informant calls from a variety of sources (other ministries, Albertans, Students, Schools, Federal gov., investigations, etc.) to verify information and make recommendations to send the file to the Assessing or investigations team at Service Alberta (Advanced Education Special Investigation (AESI) for action.
- Provide program expertise, training and advice requiring in-depth interpretation of policy to third party contractors and external stakeholders (e.g., clarity on program requirements, navigating the SFS).

- Proactively communicate issues to the appropriate ministry staff and recommend actions to expedite issues resolution.
- Identify operational gaps and improvement opportunities and develops ways to resolve or diminish them by collaborating internally with other staff.
- Identify current or potential practical impacts of policy initiatives to Policy Analysts, and participate in the planning and implementation of solutions for issues arising from these initiatives.
- Contribute expertise to projects and committees as assigned by the Supervisor.

All CRU incoming correspondence to the branch is reviewed and managed to ensure that an appropriate action is taken in a timely manner.

- Review all escalated correspondence received by mail, e-mail, and fax, and route the correspondence or respond as required.
- Engage proactive measures to complete any gaps in documents sent into the branch (e.g., contact clients by email or phone to obtain missing information that would prevent an application from being assessed).
- Identify Level 2: Request for Executive Review following thorough review of individual student situation and recommend outcome based on policy, legislation and regulations.
- Compose correspondence in response to inquiries and issues raised, explaining relevant policies, guidelines, processes, and results of assessments and re-assessments as required.

The ASU/COR/CRU Team is supported in achieving its goals and priorities.

- Track data and note trends to shape reports and potential changes to operational or program policy and/or process.
- Identify and or participate in development of new or revised process and procedures or data systems.
- Raise awareness to issues of significance and participate in related resolution strategies
- Collaborate and share information across the team and with other units to support efficient and client-focused student funding program administration.
- Research and participate in the drafting of responses to action requests and briefings in line with existing timelines and standards.

Problem Solving

Typical problems solved:

- Escalated issues are complex, unique, often emotionally charged, and require further examination and research to find a suitable solution that balances the priority for a student focused student aid system with existing policies and legislation (e.g., application refusals, repayment challenges). This position applies thorough knowledge of loan and grant policies and processes to resolve individual client issues.
- The continually changing nature of educational funding program policies, criteria and guidelines adds to problem-solving complexity. Changes to federal funding can lead to changes in the provincial processes or policies. When reviewing and/or reassessing applications, the criteria and guidelines that apply to a specific year must be considered.
- The Specialist manages multiple cases at any one time and ensures that all cases are managed to resolution in a fair, objective, consistent and timely manner within the framework of program policies, and legislation.

Types of guidance available for problem solving:

The Client Resolution Specialist takes ownership of escalated client issues and ensures issues are resolved within acceptable timelines and within program policy and legislation. Effective resolution requires broader consideration of how policies and processes impact students. Most decisions are made independently; however, clear precedent is not always available requiring interpretation of policy or legislation and discretionary decision making. In these cases, the Specialist prepares a recommended course of action and supporting evidence and consults with the Supervisor for final approval. Issues that are particularly sensitive or complex are supported by the Supervisor. The Specialist also has the authority to take cases to management review.

The position has the authority to prioritize a student's file based on a file being escalated or the student facing an emergency. The Client Resolution Specialist is responsible for reviewing the assessment of escalated files; ensuring accuracy based on operational policy. Any discrepancies are reported to the appropriate unit for review and correction (e.g. eligibility issues are referred to Assessing Unit).

Direct or indirect impacts of decisions:

Externally, the work of this position impacts:

- Alberta clients seeking funding for post- secondary education through resolution of escalated issues, which clarifies eligibility for and access to funding.
- The successful implementation of multiple federal and provincial loan and grant programs, through the quality assurance and appropriate application of program policy.

Internally, the work of this position impacts:

- program policy and operational business rules by identifying areas that reflect potential gaps or inconsistencies through tracking issue files over time and recommending changes or amendments to policy and procedure to improve the quality of service received by Alberta Student Aid's primary clients.
- The review and response to incoming correspondence, which impacts the branch's ability to respond more efficiently to clients and stakeholders, thus preventing inquiries turning into more serious issues.

Key Relationships

Major stakeholders and purpose of interactions:

Internal

- CRU Supervisor - participate in team planning; raise awareness to gaps and opportunities to improve operational process; report on trends in issues logged over time
- Various units within the Alberta Student Aid - collect information and initiate action to resolve client issues; maintain awareness of student aid policies and processes; provide input to business or policy improvements
- Service Alberta - share information with the regarding students that have rehabilitated their defaulted student loans
- Units in other ministries (e.g., Career Employment Counsellors (Alberta Works Offices) and Income Support - communicate to resolving client's issue
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External

- Third party providers (e.g., Alberta Student Aid Service Centre) - Handle escalated calls; provide guidance and interpretation of policies and processes
- Clients / Students - resolve issues and communicate progress and results of information management
- Authorized third parties (e.g., Powers of Attorney) - communicate regarding resolution of issues
- Service Delivery Partners (e.g., National Student Loan Service Centre; Canada Student Loans Program, Banks) - Communicate regarding escalated calls; provide guidance and interpretation of policies and processes; share information; receive guidance regarding the application of federal policy
- Financial Aid Officers in Educational Institutions - respond to queries related to issues with specific student files

Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Bachelor's Degree (4 year)	Arts		

If other, specify:

Social sciences

Job-specific experience, technical competencies, certification and/or training:

Education and Experience

- Undergraduate degree in a related field (e.g., social sciences)
- Experience with front line program delivery is an asset.

Technical Competencies, certification and/or training

- Thorough knowledge of and ability to apply knowledge of all Alberta Student Aid federal and provincial program requirements, including relevant legislation, policies, criteria, processes, and guidelines (i.e. *Canada Student Loans Act*; *Canada Student Financial Assistance Act*; *Student Financial Assistance Act* and Regulations; Students Finance Board / Ministerial Rulings; Canada Student Loan Policy and Procedures Manual; Assessing Guidelines)
- Knowledge of other GOA or federal programs that the client is accessing, and knowledge of how that program may interact with Alberta Student Aid and how to refer a client to said program if they are not eligible for ASA (Alberta Works, Scholarships etc.)
- Familiarity with policies relating to the provision of student / client academic progression and enrolment status by educational institutions and with previous and current default and bankruptcy policies to determine whether

applicants with defaulted loans, bankruptcy, and grants referred to collection agencies should be approved for or denied further educational funding

- Ability to effectively use relevant information systems (i.e. Student Finance System, HUGH; PAPRS; 1GX, Galaxy, & ARTS) and software tools (i.e. Microsoft 365 applications; Adobe Acrobat; internet; InDesign; SharePoint; and Captivate)
- Knowledge of FOIP to ensure compliance when dealing with client information
- Demonstrated strong decision-making and problem-solving skills
- Ability to pay close attention to detail
- Well-developed written and verbal communication skills to communicate with different audiences, at times in stressful situations
- Advanced conflict resolution skills to de-escalate highly emotional situations are essential
- Organization skills to coordinate and manage multiple ongoing cases at any one time
- Ability to persuade, convince, influence others to reach a result that reflects the policies and legislation and is generally acceptable to students and relevant parties
- Ability to form and maintain a broad network of professional relationships to assist the Specialist in complex case management
- Research and analysis skills to thoroughly investigate issues and action requests
- Decision-making and judgement skills to determine the course of action to resolve an issue, and to know when to raise more complex issues to higher levels of management
- Ability to interpret policies and procedures in plain language terms suitable for their audience
- Ability to interpret student documentation/requests and ensure that the appropriate action is taken to fulfill the student's request accurately

Behavioral Competencies

Pick 4-5 representative behavioral competencies and their level.

Competency	Level					Level Definition	Examples of how this level best represents the job
	A	B	C	D	E		
Systems Thinking	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Considers inter-relationships and emerging trends to attain goals: <ul style="list-style-type: none"> • Seeks insight on implications of different options • Analyzes long-term outcomes, focus on goals and values • Identifies unintended consequences 	Considers inter-relationships among initiatives in relation to department priority and expected program outcomes; considers implications of different options when making decisions; thinks broadly about program advise and issue resolution to consider how changes will be integrated and transitioned into existing operations.
Creative Problem Solving	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Focuses on continuous improvement and increasing breadth of insight: <ul style="list-style-type: none"> • Asks questions to understand a problem • Looks for new ways to improve results and activities • Explores different work methods and what made projects successful; shares learning • Collects breadth of data and perspectives to make 	Seeks and suggests new ideas and approaches to improve program procedures; breaks problems down to facilitate the identification of solutions; shares learnings with others.

		choices	
Agility	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Works in a changing environment and takes initiative to change:</p> <ul style="list-style-type: none"> • Takes opportunities to improve work processes • Anticipates and adjusts behaviour to change • Remains optimistic, calm and composed in stressful situations • Seeks advice and support to change appropriately • Works creatively within guidelines 	Sees the need and readily steps in to help others on the team; anticipates change and adapts behaviour; is nimble and open to changes; takes advantage of opportunities to improve processes.
Develop Networks	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Maintains collegial internal relationships and understands external network:</p> <ul style="list-style-type: none"> • Seeks to understand perspectives and needs of others • Follows through, has integrity and respect for others • Helps and follows through • Keeps key stakeholders informed; is professional and respectful 	Builds relationships by following through on commitments, demonstrating integrity and respect for others; informs key stakeholders of relevant information in a timely manner; seeks and applies the perspectives and needs of colleagues, and stakeholders.

Benchmarks

List 1-2 potential comparable Government of Alberta: [Benchmark](#)