

Update

Ministry

Advanced Education

Describe: Basic Job Details

Position

Position ID

Position Name (30 characters)

Assessment Specialist

Current Class

Program Services 1

Job Focus

Operations/Program

Supervisory Level

00 - No Supervision

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

Employee

Employee Name (or Vacant)

Organizational Structure

Division, Branch/Unit

PCCSA, SFS/Assessing and Disability Supports



Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor, Assessing

Supervisor's Current Class

Program Services 3

Design: Identify Job Duties and Value

Changes Since Last Reviewed

Date yyyy-mm-dd

2025-08-18

Responsibilities Added:

N/A

Responsibilities Removed:

N/A

Job Purpose and Organizational Context

Why the job exists:

The Assessing Unit is responsible for the delivery of the Alberta Student Aid program, which includes federal and provincial student loans, grants, awards, and student disability supports. Funding for students is based on individual need with eligibility determined in accordance with a wide variety of federal and provincial legislation, program policies, criteria, and guidelines. In addition to providing funding to Alberta post-secondary students, the Assessing Unit is also accountable for the Request for Review process (all

appeals, requests for additional funding, and changes in circumstances that students submit), and the Quality Assurance program that monitors, tracks and responds to incorrect, misleading, and fraudulent information submitted on student aid applications.

To be effective, the Assessment Specialist collaborates with other units across the Branch and Division to interpret policies applicable to the current and previous years, and to provide guidance as needed. The Assessment Specialist also applies expert program knowledge, interprets relevant legislation, regulations and policies, completes numerous reviews and calculations, and researches and validates multiple pieces of information to uphold the program's financial integrity while approving funding in accordance with all provincial and federal eligibility criteria.

The work performed by the Assessment Specialist delivers on the ministry's mandate and business plan to deliver a sustainable student aid program for Alberta post-secondary learners to experience less financial barriers as they earn their post-secondary credentials, while also ensuring that the program is accountable to taxpayers.

Responsibilities

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

Review and assess full-time and part-time applications for post-secondary students, including students with disabilities, to determine eligibility for federal and provincial post-secondary student financial assistance. The Assessor reviews a constantly increasing intake of applications as the student aid program is demand-driven. On an annual basis, the assessor processes thousands of applications, and has the delegated authority to approve awards exceeding \$50,000 per application.

- Apply thorough and advanced working knowledge of federal and provincial legislation, regulations, policies and guidelines.
- Determine the type and level of funding based on the student's program and duration.
- Solicit additional information or validation of information as needed from internal units, students, and educational institutions.
- Determine eligibility of funding across multiple factors including residency, marital status, defaults, restricts, individual need, correct program, year of program, specialization.
- Investigate precedents to address situations that fall within gray areas in policy documents and procedure manuals.
- Review student history and analyze files for individual circumstances to accurately calculate student award to determine loans and grants eligibility by interpreting program policies and guidelines resulting in authorization of additional or reduced funding.
- Assess and approve awards for students in professional programs in situations where the system is unable to recognize or calculate the correct award amount.
- Process disability applications, once the disability status and the required services and equipment are approved by the Disability Supports Unit, to determine the complete financial assessment of students with disabilities in accordance with applicable legislation, regulations, policies and program guidelines.

Review Request for Reconsideration (RFR) Level 1 applications to determine eligibility and appropriate level of funding in accordance with applicable legislation, regulations, policies and program guidelines to ensure policy is applied consistently across all files.

- Review, analyze and complete Level 1 RFR of student file to ensure that financial assistance decisions are determined correctly, including assessment of historical information contained in Program IT systems as well as any supporting documentation submitted by the student.
- Review student-provided documentation to assess for additional expenses and increased awards such as lease agreements, mortgage documents, property tax bills, utility bills, child care expenses, medical/dental/optical bills, insurance premiums, mileage determination, and

emergency or one-time expenses such as car repairs, funeral costs, emergency relocation, etc.

- Research precedents and determine options for resolving RFR applications (Level 1, 2 or 3).
- Determine eligibility and authorize awards for exceptional expenses within predetermined values allowed under policy.
- Allocate additional funds allowed in policy for specific circumstances and professional programs.
- Determine eligibility and put forward recommendations to supervisors and manager for awards exceeding exceptional expenses limits assigned to the position.
- Develop and recommend exemptions of specific resources from needs assessment, exceptions to eligibility requirements, and exceptional funding exceeding authorized amounts in accordance with federal and provincial regulations and policies.

Identify and review files under the Quality Assurance (QA) review process to determine misleading, inconsistent, or potentially fraudulent information, provided intentionally or unintentionally, to ensure the right amount of funding is provided to the right students at the right time in accordance with applicable legislation, regulations, policies and program guidelines.

- Review informant referrals that are received from internal and external stakeholders for the alleged incorrect information and determine any material impacts on the award assessment.
- Identify and review inconsistencies in the information provided on student aid applications relative to previously submitted applications and across multiple students.
- Request and gather information from the student, and verify the information against previously submitted application(s) for the student and other student files, and against external IT systems, and make recommendations as to the outcome of the QA review.
- Determine the outcome of a QA review based on provincial and federal policies and regulations, as well as the decision matrix to ensure the outcome is fair and consistent amongst all students. QA review outcomes can range from a complete substantiation of information in which case no further action is required, to regulatory penalties, or to referral to investigations for potential criminal prosecution.
- Prepare QA review summary, draft communication letters to the students, and make recommendations for management approval that ensure decisions are consistent with relevant policies, guidelines and overall GOA vision.
- Track emerging QA trends at the unit level, share trends with multiple teams in the branch, and exercise significant amount of influence regarding the continuous improvement of the QA framework and policy.
- Provide coaching, expertise, and guidance to other units in the branch, such as the Client Resolution Unit and the Program Accountability Unit, related to the QA framework, review process, and re-assessment conditions and outcomes.

Review and analyze submissions for re-assessment based on a change in circumstance (separate from an RFR) to determine potential changes to eligibility of loans and/or grants awards after the award has been paid.

- Perform comprehensive reviews for specific situations and student history, including analyzing files, additional documentation, and new information impacting student situations
- Determine eligibility for funding by interpreting and applying criteria and guidelines, often having to analyze previous loan years to determine appropriate eligibility and award.
- Calculate and complete manual assessments of appropriate financial awards for students, taking into account special circumstances and exceptions, that fall within the relevant loan year for which the student received funding.

- Implement the reassessment by adjusting funds that have yet to be paid, or by conducting a Grant-To-Loan conversion where there is no opportunity for adjustments.
- Correct the information on the applications from previous loan years in the system to reflect the updated information.
- Prepare and send detailed written correspondence explaining the re-assessment details to the students.

Perform other activities and participate in working groups to contribute to the unit's achievement of its mandate and goals.

- Provide subject matter expertise to determine the impact of proposed new or revised policies and programs on post-secondary assessment operations.
- Identify inconsistencies or issues with operational policies, practices and procedures that emerge during the assessment processes.
- Identify emerging trends and opportunities relating to the assessment function and recommend potential operational strategies.
- Participate in committees such as New Year Letter Package and the annual Application Design Committee at the branch level.
- Remain current and informed as to relevant issues and developments, pro-actively recommending strategies and responses to address emerging and ongoing issues.
- Test new procedures associated with system changes or modification prior to and post implementation as required.
- Provide orientation, training and ongoing coaching to co-workers, temporary and newly hired staff.
- Provide cover-off for Assessing Supervisors as required

Problem Solving

Typical problems solved:

1 - This position routinely solves problems related to full-time and part-time student aid funding. When the Student Finance System flags applications for review, the assessor is responsible to review the messages in accordance with Canada Student Financial Assistance Program policy as well as the Alberta Student Aid policy to ensure that funding is approved appropriately based on eligibility criteria for federal and provincial loans and grants. The student aid program is a demand driven program and the Assessor is an agile and efficient person that is able to work under extreme stress conditions to provide services to Albertans in post-secondary institutions all over the world. The assessor has delegated authority to review and approve applications, within stipulated eligibility criteria, in excess of \$50,000 comprised of federal loans, multiple federal grants, provincial loans, and multiple provincial grants.

2 - This position also identifies circumstances for which the Student Finance System cannot fully perform, such as the administration of additional funding for students in professional programs. Several special circumstances are identified and addressed by the assessor upfront regularly with the aim to reduce Requests for Reviews from students.

3 - This position makes decisions pertaining to highly unusual, complex, or unique applications and files; some decisions can set precedent for the work of the team to prevent inaccurate assessment and escalation of files.

4 - This position is responsible for the identification, review, and resolution of Quality Assurance files. The assessor is responsible for upholding the program's integrity at the application level by ensuring information submitted is correct, accurate, consistent, and meets the eligibility criteria for provincial and federal funding.

5 - This position exercises sound judgement when collecting, prioritizing and analyzing information

received from multiple sources.

6 - This position is responsible for reviewing and addressing all Requests for Reviews Level 1 correctly and efficiently to reduce the number of RFR Level 2 (Executive Review) and Level 3 (Ministerial Review).

Types of guidance available for problem solving:

The Assessment Specialist has freedom to determine the appropriate way to approach and resolve issues and is expected to provide appropriate justification for determinations and decisions. Information from students, other branch units, other Ministries and/or education institution representatives is often obtained or clarified and then compared to existing program policy and legislation to make decisions. Correspondence drafted by the Assessment Specialist must balance the requirement to maintain confidentiality with the obligation to appropriately apply the criteria and guidelines associated with varied educational funding programs.

Problems are solved within the parameters of established legislation, regulations, policies, plans and guidelines as guidelines vary based on marital status, residency, disability and program type. Manual calculations and workarounds in the system are also required for all program types. Unique situations fall outside this spectrum and require specific tailored solutions. Decisions outside established policies, without clear precedent or with the potential for political sensitivity or impact to the program are discussed with the Supervisor. In these cases, the Assessment Specialist completes the review and research of options and prepares a recommendation for management approval. Procedure gaps are then addressed within the unit, and in other units as appropriate. The Supervisor is available to provide guidance as needed for major changes to program delivery processes, new programs and associated criteria and guidelines, and system modifications.

Direct or indirect impacts of decisions:

Externally, the work of this position impacts:

- Financial eligibility decisions for student funding that result in the provision of funding to support Alberta student participation in post-secondary education to achieve their career goals. The Assessor processes millions of dollars in student aid funding to dozens of thousands of Albertans of all demographics, attending different post secondary institutions all over the world.
- Program and funding integrity and management of the student aid through consistent application of policy, process and guidelines.
- Interpretation and understanding of policy and funding decisions, application processes by providing guidance and explanations to multiple external stakeholder groups.

Internally, the work of this position impacts:

- Consistent application of existing policy and guidelines to assess applications and determine eligibility, which is part of an interconnected overarching process for the Student Aid program in Alberta.
- Advice and collaboration across internal units to support a seamless and efficient student aid program administration.
- New or revised program procedures through identification of common queries and issues that are raised by students or identified through the application process

Key Relationships

Major stakeholders and purpose of interactions:

Internally, this position interacts daily with branch staff and teams, as well as Management to collaborate, exchange information and provide recommendations and advice in relation to student aid funding. Additionally, on a weekly, bi-weekly, and AD HOC basis, this position participates in working groups and several operational enhancement initiatives and projects.

Externally, this position communicates and interacts daily with Albertans who apply for student aid assistance, as well as representatives from post-secondary educational institutions.

Required Education, Experience and Technical Competencies

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

If other, specify:

any related degree or experience

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

4 years of related experience

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"/>	<p>Considers inter-relationships and emerging trends to attain goals:</p> <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 	
Creative Problem Solving	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Focuses on continuous improvement and increasing breadth of insight:</p> <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 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 	

		<ul style="list-style-type: none"> • Seeks advice and support to change appropriately • Works creatively within guidelines 	
Drive for Results	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	Works to exceed goals and partner with others to achieve objectives: <ul style="list-style-type: none"> • Plans based on past experience • Holds self and others responsible for results • Partners with groups to achieve outcomes • Aims to exceed expectations 	

Benchmarks

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

023 PS63 Employment Standards Officer, Labour

022 PS41 Intergovernmental Officer, Economic Development & Trade

Note: This is not on the benchmark list, but **please** consider using Client Service Specialist - Foundational Learning Services as a comparable.

Assign

The signatures below indicate that all parties have read and agree that the job description accurately reflects the work assigned and required in the organization.

Employee Name

Date yyyy-mm-dd

Employee Signature

Supervisor / Manager Name

Date yyyy-mm-dd

Supervisor / Manager Signature

Director / Executive Director Name

Date yyyy-mm-dd

Director / Executive Director Signature

ADM Name

Date yyyy-mm-dd

ADM Signature