Position Description Form (PDF)

College: ALGONQUIN	
Incumbent's Name:	
Position Title: CLIENT SERVICE REPRESENTATIVE	Payband: D
Position Code/Number (if applicable): P00024	
Manager's Name and Title: Manager, Contact Centre and Servi	ice Counter
Completed by: Manager, Contact Centre and Service Counter	Date:
Signatures:	
Incumbent: (Indicates the incumbent has read and understood the PDF)	Date:
Supervisor:	Date:
Supervisor's Supervisor:	Date:

Other comments: The incumbent in this position works Monday to Thursday from 11:30 am to 7:45 pm and Friday from 8:30am until 4:45pm.

Instructions for Completing the PDF

- 1. Read the form carefully before completing any of the sections.
- 2. Answer each section as completely as you can based upon the typical activities or requirements for the position and not on exceptional or rare requirements.
- 3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.
- 4. Ensure the PDF is legible.
- 5. Responses should be straightforward and concise using simple factual statements.

Position Summary

Provide a concise description of the overall purpose of the position.

Reporting to the Manager, Contact Centre and Service Counter (CCSC), the Client Service Representative responds to a wide variety of in-person, telephone, mail, fax, e-mail and other web-based inquiries and provides information on all College programs, courses and other activities and services offered by the College. The incumbent performs a variety of responsible clerical services related to admission and registration for programs and courses including withdrawals and course changes, drops or adds, accepts payments, processes fee deferrals, enters grades, assigns lockers, issues receipts and timetables, and reconciles daily transactions. The incumbent informs clients about College policies and procedures in a knowledgeable and comprehensive manner.

The Client Service Representative is often the first point of contact for both the Registrar's Office and the College and is responsible to set a positive, professional tone in interactions with all clients. The incumbent is an integral team member within the College and the Registrar's Office.

The incumbent in this position works Monday to Thursday from 11:30 am to 7:45 pm and Friday from 8:30am until 4:45pm.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*
Updates student records by:	45%
 Ensuring the accuracy of student information entered on the Student Information System, updating information as required 	
Creating new student records as required, using the Student Information System, and requests merges of duplicate records found	
Registering clients into continuing education courses	
Processing requests for courses transfers, withdrawals and re-registrations, including the collection of fees as required	
Receiving payments and issuing receipts and timetables	
Processing Fee Deferrals as required	:
Entering grades	1 I 1 I
 Identifying and allocating lockers from the inventory, recording details on the Student Information System as appropriate 	
Initiating the process for credit card refunds	
 Explaining encumbrances to clients and receipting payments, as required, for financial encumbrances 	
 Enforcing deadlines as stipulated in academic policy, referring exceptional cases to the Manager 	
Reconciling daily transactions (cash, cheque, debit and credit card receipts) between bank and Student Information System summaries	

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Provides information to clients by:	45%
 Responding to a wide variety of in-person, telephone, mail, fax, e-mail and other web-based inquiries 	
 Explaining College policies and procedures related to admission, registration, fees and student records 	
 Articulating and applying College confidentiality policies and provincial and federal freedom of information legislation in all transactions 	
 Answering and responds in a diplomatic manner to concerns and/or issues received from the College Community and the general public 	
 Informing applicants on the availability of possible program or course choices and refers, as required, to the appropriate academic department for advising 	
 Providing information and navigational assistance regarding access to College, OCAS, OSAP and other websites 	
Provides additional phone service by:	2%
 Receiving incoming calls and directing clients to the appropriate individual or department 	
 Answering and responding to emergency calls by remaining calm and questioning the caller about the nature of the emergency situation 	
 Understanding, operating and explaining the use of the Cisco phones and voice mail 	
Explaining how to use the online digital phone directory	
Performs other related duties by:	8%
 Training full-time and part-time staff and providing on-going support as required 	
 Participating in Registrar's Office promotional activities, staff meetings and special projects that arise from time to time 	
Entering grades as required	
Other duties as assigned by the Manager	! ! != = = = = = = = = = = = = = = = = = =

To help you estimate approximate percentages:

½ hour a day is 7%

1 hour a day is 14%

½ day a week is 10%

½ day a month is 2%

week a year is 2%

1 hour a week is 3% 1 day a month is 4%

4

1. Education

Α.	check the box that best describes the minimum level of formal education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.					
		Up to High School or equivalent	V	1 year certificate or equivalent		2 year diploma or equivalent
		Trade certification or equivalent		3 year diploma / degree or equivalent		3 year diploma / degree plus professional certification or equivalent
		4 year degree or equivalent		Post graduate degree (e.g. Masters) or equivalent		Doctoral degree or equivalent
	Fiel	ld(s) of Study:				
	Re	elated to business, office administra	 atic	on, marketing or contact centr	e aç	gent.
B.	Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.					
		No additional requirements				
		Additional requirements obtained course(s) of a total of 100 hours		·		
		Additional requirements obtained course(s) of a total between 10 hours				
		Additional requirements obtained course(s) of a total of more that hours				

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

	Less than one (1) year	
	Minimum of one (1) year	
	Minimum of two (2) years	
V	Minimum of three (3) years	Minimum of three years of related, full-time practical experience in serving clients.
	Minimum of five (5) years	
	Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

Key issue or problem encountered.

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

A client wishing to withdraw from a program or course.

In-person, phone, e-mail and other web-based communications.

Validating client information and status in program/course on GeneSIS.

Identifying the appropriate course of action based on established refund policies. Initiating the process for credit card refunds. Identifying the possibility of manual updates required to subledger entries in order that clients receive the correct refund, if any.

Consulting with GeneSIS as well as online and hard copy information sources and procedures manuals. Raising exceptional items to the appropriate Coordinator or to the Manager. Past practices.

#2 regular & recurring

Key issue or problem encountered

How is it identified?

A client wishes to obtain confidential information.

In-person, phone, e-mail and other web-based communications.

Is further investigation required to define the situation and/or problem? If so, describe.

Validates client identity either in the form of photo identification or by asking specific probing questions. Validates third party access to information on GeneSIS.

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Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

Once validated, provides or declines to provide the information requested, as appropriate. If the latter, the incumbent identifies means and alternatives for the client to pursue in order to obtain the information requested.

Consulting with GeneSIS as well as online and hard copy information sources and procedures manuals. Raising exceptional items to the appropriate Coordinator or to the Manager. Past practices.

#3 regular & recurring

Key issue or problem encountered

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

A client wishes to become registered into a program or course but is unable to pay fees.

In-person, phone, e-mail and other web-based communications.

Validating client information and status in program/course or admissions status on GeneSIS.

Identifying the appropriate course of action based on established fee payment policies (such as special circumstances for Registrar's Office deferrals, OSAP recipients, sponsored clients). The incumbent must decide whether to adhere to policy, to offer alternatives, or to refer to other departments (including to others within the Registrar's Office) to make appropriate arrangements.

Consulting with GeneSIS as well as online and hard copy information sources and procedures manuals. Raising exceptional items to the appropriate Coordinator or to the Manager. Past practices.

practices, established standards or

guidelines).

	#1 occasional (if none, please strike out this section)
Key issue or problem encountered	A client requests to change his/her locker assignment.
How is it identified?	In-person, phone, e-mail and other web-based communications.
Is further investigation required to define the situation and/or problem? If so, describe.	Validating client information and status in program/course as well as locker assignment on GeneSIS.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Identifying the appropriate course of action based on established locker issuance policies (such as special circumstances for Apprentices and handicapped clients). The incumbent must decide whether to adhere to policy, to offer alternatives, or to refer to other departments to obtain special permission to change lockers.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Consulting with GeneSIS as well as online and hard copy information sources and procedures manuals. Raising exceptional items to the appropriate Coordinator or to the Manager. Past practices.
	#2 occasional (if none, please strike out this section)
Key issue or problem encountered	A client wishes to obtain a copy of their official tuition taxation receipt (T2202A).
How is it identified?	In-person, phone, e-mail and other web-based communications.
Is further investigation required to define the situation and/or problem? If so, describe.	Validating client information and status in program/course as well as eligibility for a T2202A for the taxation year in question on GeneSIS.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Identifies eligibility of the client to receive a T2202A. The incumbent must determine where the client's request must be referred for action – either elsewhere in the Registrar's Office (in the case of returned mail) or to the College Finance department (in the case of a reprinted document).
What sources are available to assist the incumbent finding solution(s)? (eg. past	Consulting with GeneSIS as well as online and hard copy information sources and procedures manuals. Raising

exceptional items to the appropriate Coordinator or to the Manager. Past practices.

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

#1 regular & recurring

The incumbent plans his/her time daily in order to address priorities and required workload.

Time management skills, the ability to prioritize daily tasks and the ability to multi-task are required.

E-mail, calendar, staff schedule.

The need for this planning and prioritizing is ongoing and requires attention throughout the day.

Decisions affecting changes and/or impact on others are made in conjunction with the Manager, Client Service.

4. Planning/Coordinating

	#1 occasional (if none, please strike out this section)
List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	

4. Planning/Coordinating

	#2 occasional (if none, please strike out this section)
List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
		Minimal requirement to guide/advise others. The incumbent may be	The incumbent explains College policies and procedures to clients.
		required to explain procedures to other employees or students.	The incumbent is responsible to assist in the training of new and existing Client Service Representatives including regular business practices as well as the use of online and hard copy resources and applications.
			The incumbent recommends courses of action to others in the College as inquiries relate to such services as staff registration into courses
		There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	
		The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
		The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	

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	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?

Regular and Recurring

Occasional (if none, please strike out this section)

- Performs day-to-day activities and works independently, exercising judgment according to established processes, policies and directives.
 - Receives instructions from the Manager or Client Service Coordinator only for new or unfamiliar processes as they arise.

What rules, procedures, past practices or guidelines are available to guide the incumbent?

Regular and Recurring

Occasional (if none, please strike out this section)

- College, Registrar's Office, OCAS and OSAP websites; IntelliResponse; GeneSIS; ACSIS; myAlgonquin.
- College publications (Calendar; onCourse; program monographs; First Step; Next Step; Test Centre booklet; Welcome Back booklets).
- External publications (OCAS Handbook; Ontario College Guide).
- Staff lists (Faculty/School listing; CE Coordinators List; electronic phonebook).

HRIS: Blackboard: College Directives.

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?

Regular and Recurring

- Day-to-day work is checked by exception only through informal and formal meetings with the Manager.
- Staff meetings and information sessions/ workshops are held regularly to exchange information and to identify and/or resolve problems.
- Financial transactions are checked daily by report.
- Registrar's Office client service statistics are monitored daily and pertinent items are discussed as required.

Occasional (if none, please strike out this section)

 Comments regarding work performance that originate directly from clients are shared as they are received.

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?

Regular and Recurring

 Consults with the appropriate staff member within the Registrar's Office to gather information or seek guidance related to infrequent or unfamiliar situations.

Occasional (if none, please strike out this section)

 Consults with the appropriate academic department or school to gather information or seek guidance related to infrequent or unfamiliar situations.

Describe the type of decisions that would be decided in consultation with the Supervisor.

Regular and Recurring

- Consults when situations contravene College policies and processes.
- Consults when daily reconciliation does not balance.
- Consults when equipment fails or breaks down.
- Consults when processes require reconsideration or re-evaluation.

Occasional (if none, please strike out this section)

- Consults when major complaints are received about the College or about the service provided.
- Consults regarding problems in the work environment.

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Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring

Occasional (if none, please strike out this section)

• Assesses client need and determines/provides the best course of action to assist each client.

• Determines to whom a request for academic guidance or specialized information should be referred.

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency
How is it received?	How is it carried out?	! ! L	(D, W, M. I)*
The incumbent is the primary point of contact for	In-person and telephone inquiries are routed to the	External Prospective students,	D
the Registrar's Office and for the College. Clients request assistance via in-	first available Client Service Representative logged into Q-Matic or the	former students, parents, employers.	_
person, telephone, mail,	Cisco Desktop agent, respectively.	Guidance counsellors, government agencies.General public.	
based means.	Other modes of client communication (mail, fax,	Media representatives. Internal	M
	e-mail and other web- based means) are	 Students 	D
1 1 1	processed as assigned by the Manager or according	 Faculties, Schools and other departments 	D
! ! ! !	to Registrar's Office practices and procedures.	Other Registrar's Office staff	D

^{*} D = Daily W = Weekly M = Monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy	 Responding to clients' general information inquiries. 	Students, prospective students, former students, parents, employers, guidance counsellors, general public, College staff.	D
Explanation and interpretation or ideas	 Discussing withdrawal options with clients. Explaining reasons for encumbrances on client records. Advising clients about fee payment options. Explaining the use of ACSIS and the various self-serve options available. Explaining College and Registrar's Office website navigation. Assisting with the training of new and existing staff regarding Registrar's Office business practices and computer desktop applications. 	Students, prospective students, former students, parents, employers, guidance counsellors, general public, College staff. Other Client Service Representatives, other Registrar's Office staff.	D M
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			

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* D = Daily W = Weekly M = Monthly I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
			1 - 2 hrs at a time		Yes	No	N/A
Sitting	D			$\overline{\checkmark}$	☑		
Standing	D	Ø				 	
Walking	D	Ø				!	
Lifting	W	Ø			\square		

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If lifting is required, please indicate the weights below and provide examples.

- Light (up to 5 kg or 11 lbs)
- □ Medium (between 5 to 20 kg or 11 to 44 lbs)
- □ Heavy (over 20 kg or 44 lbs)

 Office supplies, printer paper, reference materials.

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency	Average Duration			
	(D, W, M, I)*	Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs	
During admission and other peak activity, there is a larger than normal volume of client inquiries. The complexity of questions often require more detailed information and generally more investigation is required to avoid errors and ensure that clients have all the information they require. The incumbent will be required to access information from and continually shift focus between multiple electronic sources (GeneSIS, College, departmental and Registrar's Office websites, etc.) simultaneously, relaying information and discussing options to/with clients.	D	✓			
Can concentration or focus be maintained throughout the duration of the activity? If not, why?					
✓ Usually					
i 🗆 No					

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Activity #2	Frequency	Average Duration			
	(D, W, M, I)*	Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs	
The incumbent is required to reconcile financial transactions at the end of every shift. Daily reconciliation requires special attention to detail in the data entry and receipting of cash, cheque, debit and credit card transactions as well as in the cross referencing required in order to balance in the event of an error. The incumbent must be familiar with and use two different financial systems – one at the Service Counter and the other in the Contact Centre	D	Ø			
Can concentration or focus be maintained throughout the duration of the activity? If not, why?					
Usually □ No				! ! !	

Activity #3	Frequency	Average Duration				
	¦ (D, W, M, I)*	Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs		
The incumbent deals with upset clients and must empathize with the client, attempt to diffuse the situation and still provide professional service. In handling these situations, the incumbent must listen closely to each client's request, ask questions to validate their understanding and communicate final information and decisions back to the client. Effective and active listening skills are essential in ensuring that the correct service is being provided to clients.	М	☑				
Can concentration or focus be maintained throughout the duration of the activity? If not, why?						
☑ Usually						
□ No						

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11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D, W, M, I)*
 ✓ acceptable working conditions (minimal exposure to the conditions listed below) □ accessing crawl spaces/confined spaces 	The incumbent works in a normal indoor office environment, subject to seasonal temperature fluctuations.	D
i	! !	
dealing with abusive people	The incumbent provides service to upset clients who may become verbally abusive.	I
□ dealing with abusive people who pose a threat of physical harm	;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;	; ,
□ difficult weather conditions		
□ exposure to extreme weather conditions	;	
□ exposure to very high or low temperatures (e.g. freezers)		
□ handling hazardous substances		
□ smelly, dirty or noisy environment	;	
□ travel		'
□ working in isolated or crowded situations	*	
□ other (explain)	r	r

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