

Financial Aid Specialist
Review Form

Employee: _____

Review Quarter: _____

Reviewer: _____

I. General Financial Aid Knowledge Month/Year of Review:

	A	U	Observation Method
a. FAS demonstrates knowledge of qualifying criteria for varying sources of TWS Financial Aid.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
b. FAS can direct customers where and how to apply for financial aid.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
c. FAS demonstrates knowledge of career office and community resources.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
d. FAS demonstrates knowledge of available child care options.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
e. FAS can discuss the community resources that are available in the area of _____*	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
f. FAS demonstrates knowledge of scholarships and a working relationship with two training providers or educational institutions.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
Total Acceptable:			_____
*choose an available resource such as transportation, child care, scholarships, etc.			

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II. Labor Market Information

Month/Year of Review:

	A	U	Observation Method
a. The FAS demonstrates knowledge of 5 occupations in The WorkSource area.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
b. The FAS demonstrates knowledge of current trends regarding the local labor market.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
c. The FAS demonstrates knowledge of how to handle a customer who requests training in an occupation outside of the WorkSource's targeted list?	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
d. The FAS demonstrates knowledge of how to get information regarding pay, qualifications, and training needs for jobs identified in the targeted list.	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			

Total Acceptable _____

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III. Customer Communication/Interaction

Month/Year of Review:

	A	U	Observation Method
a. Did the FAS adequately address the needs of the customer?	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
b. Was the training the customer requested adequately discussed and explored prior to any decision being made?	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
c. Did the FAS spend a justified amount of time with the customer?	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
d. Was a common understanding reached with the customer regarding her/his needs?	<input type="checkbox"/>	<input type="checkbox"/>	
Comment:			
	A	U	Observation Method
e. Did the FAS inform the customer of the next step?	<input type="checkbox"/>	<input type="checkbox"/>	
Total Acceptable:			

IV. Reviewer Comments/Justification of Observation Scores