



FINANCIAL AID SPECIALIST TRACKER

Position Description

The individual in this position helps residents requesting The WorkSource financial aid to understand and meet the requirements for financial aid. She/he has special responsibility for helping customers requesting child care financial aid. She/he communicates eligibility information to The Financial Aid Payment Office and tracks customer payments made by career office staff to resident customers. This individual also provides basic services to all The WorkSource customers.

Reporting Requirements

Reports to _____ (line supervisor)

External Relationships

Internal Relationships

Resident Service Division: All career office staff but has a particular need to work well with Personal Service Representatives and Financial Aid Specialists, Financial Aid Payment office Funds Analysts

Employer Service Division: Recruiters, Business Consultants

Qualifications

- Education – must have completed high school or have a GED. Some college is preferred.
- Experience – Must have at least two years of experience in the world of work. Experience in customer service work is strongly preferred
- Must have basic math skills and strong attention to details
- Must be able to apply eligibility rules to a diverse set of circumstances
- Able to listen to customers, analyze expressed needs and explain The WorkSource request for information to qualify for financial aid
- Uses tact, diplomacy, and persistence in providing suggestions to customers

- Proficient in Microsoft Windows and Office; familiar with and able to use computers; able to learn new software
- Works well in teams and with resident customers and other staff (flexible, congenial and adaptable)
- Able to communicate orally and in writing at a business level
- Self-motivated and self-directed
- Results-oriented

Duties and Responsibilities

The WorkSource Resident Customers

- Helps customers complete The WorkSource Financial Aid application
- Helps The WorkSource customer to gather necessary documents for proof of eligibility for The WorkSource financial aid
- May determine eligibility for all types of The WorkSource financial aid
- May issue vouchers for customers approved for The WorkSource financial aid for scholarships
- Uses good judgment when suggesting to a customer that she may benefit from individual help from career office staff specialists or other community resources
- Helps customers to complete an application in WorkInTexas.com
- Provides direct job matching of open system postings with the customer's skills and work requirements
- Offers qualified job candidates the opportunity to interview for posted jobs
- May check with the candidate or the employer to assess quality and success of the referral

The WorkSource Resident Customers Requesting Child Care Financial Aid

- Provides answers by telephone or in person to questions about The WorkSource financial aid for child care
- Determines customer needs and eligibility for The WorkSource financial aid for child care in person or over the telephone
- Assures that customers who receive The WorkSource child care financial aid understand the rights and responsibilities connected to the financial aid.
- Shares information about the types of child care services available and directs the customer to community resources using information line 211
- Adds customers to the wait list when they request financial aid for child care that is not immediately available
- May issue a form letter to each customer who has been placed on the wait list

Records

- Enters information in the appropriate management information system for customers eligible to receive The WorkSource financial aid
- Maintains physical/paper files as needed
- May collect school attendance records or other information from customers who are receiving The WorkSource financial aid
- May track the use of cash substitute financial aid

Communication with Financial Aid Payment Office

- Communicates with the Financial Aid Payment office, using data systems and conversation, to begin and stop financial aid payments at the appropriate times and to solve any problems associated with those payments

Performance Expectations

1. Provides good customer service

Supervisors measure this expectation by observing at least three (3) customer interviews a quarter noting the following four (4) areas for each interview:

- The Financial Aid Specialist Tracker introduces herself to the customer and spends some time in focused conversation with the customer discussing the customers request
- The Financial Aid Specialist Tracker and the customer come to a common understanding of what the customer wants and needs.
- The Financial Aid Specialist Tracker offers, and may provide, appropriate WorkSource services to help meet the needs determined above.
- The Financial Aid Specialist Tracker explains the agreed “next step” to the customer and makes an appointment or introduces the customer to a staff specialist when applicable.

The supervisor notes each of the above dimensions as acceptable or not acceptable during each of the 3 interviews observed each quarter. Performance ratings from the areas observed follow:

- ✓ Outstanding - Exceeds performance expectation – 90% - 100% of areas observed meet expectations (43-48 per year marked acceptable)
- ✓ Proficient - Meets performance expectation – 80% to 89% of areas observed meet expectations (38-42 per year marked acceptable)
- ✓ Unacceptable - Does not meet performance expectation – 79% or lower of areas observed meet expectations (37 or fewer per year marked acceptable)

2. Provides quality referrals to job postings in WorkInTexas.com

Supervisors measure this expectation by assessing referrals made by the Financial Aid Specialist Tracker on job openings in WorkInTexas.com. A customer’s work application in WorkInTexas.com must clearly document that the customer has all qualifications required in the posting to which the FAST referred her. A supervisor will select a random sample of at least 2 referrals each month or 24 referrals a year and rate the referrals using the “Quality Referral Form” matrix.

- ✓ Outstanding - Exceeds performance expectation – 90% - 100% of resident customer referrals sampled clearly document that customer met all qualifications required in the job posting
- ✓ Proficient - Meets performance expectation – 80% to 89% of referrals sampled clearly document that customer met all qualifications required in the job posting
- ✓ Unacceptable - Does not meet performance expectation – 79% or fewer of referrals sampled clearly document that customer met all qualifications required in the job posting

3. Records Review – Five (5) areas are included in the financial aid records review. A Financial Aid Specialist will have performance expectations in each area she/he performs regularly.

The supervisor reviews three (3) customer records each month for each area noted on the review form to determine if the records are complete and accurate. The supervisor can use the same customer record to review more than one area on the form.

The five areas for review are:

- 1) The WorkSource Financial Aid Application or Child Care Financial Aid Record in the CCSD is complete
- 2) Records and calculations demonstrate an economic need and qualifying income for The WorkSource financial aid.
- 3) Records include identification of correct fund sources and/or codes
- 4) Supporting documents are included
- 5) Information recorded correctly in The WorkSource Management Information System/s

A Quality Record Review Form and a Quality Record Review Guide detail the areas the supervisor will review.

The Quality of the records reviewed is:

- ✓ Outstanding – 90% - 100% of areas reviewed are complete and accurate
- ✓ Proficient – 80% - 89% of areas reviewed are complete and accurate
- ✓ Unacceptable - 79% of areas reviewed are complete and accurate

Overall Performance Rating

Outstanding – Must be rated outstanding on at least 2 performance expectations and may not be unacceptable in the other.

Proficient – Is not rated either Outstanding or Unacceptable

Unacceptable – Is rated unacceptable in any one or more of the three performance expectations