

Financial Aid Specialist Tracker

Customer Service Observation

Employee Name: _____

Name of staff making the Observation: _____

Quarter: _____

Date of Observation: _____

Financial Aid Specialist introduces herself, listens and converses with the customer

After FAST introduction, did the FAST listen to the customer fully before speaking or making suggestions?

Acceptable: Yes No

Comments:

Financial Aid Specialist reaches common understanding with the customer about customer's wants and needs

Did the FAST explain to the customer the type of child care services available?

If the customer has no knowledge of childcare services, did the FAST take the time to explain the different types of childcare services? Did the FAST provide a list of childcare providers or explain how to get information?

Did the FAST gather the necessary documents from the customer as needed proof of financial aid eligibility?

Acceptable: Yes No

Comments:

Financial Aid Specialist offers/provides appropriate services

Did the FAST verify if the customer's application is current in CCSD and TWIST?

Did the FAST assist with customer's application if needed?

Did the FAST data enter the eligibility information, type of financial aid and the time frame of the application?

Acceptable: Yes No

Comments:

Financial Aid Specialist clearly communicates next step to the customer

Did the FAST summarize what the customer wants from Workforce Solutions?

Did the FAST offer a business card?

Was the Next Step clearly explained to the customer?

Did the FAST fully explain to the customer all tasks that must be completed before leaving Workforce Solutions? Did the customer understand that any changes relating to income, employment and/or school must be reported to the Workforce Solutions within 10 business days? Did the FAST fully explain what documents (if any) are needed before they return to the Workforce Solutions? Was a date given to return?

Acceptable: Yes No

Comments: