

CASE MANAGER/FINANCIAL AID SPECIALIST (BOARD OF COOPERATIVE EDUCATIONAL SERVICES)

DISTINGUISHING FEATURES OF THE CLASS: The work involves assisting with the intake procedures for GED students, communicating workforce development and community learning with program participants and reviewing financial aid opportunities available for those students. The incumbent will be required to attend trainings by the NYS Department of Education and stay current with their credentials as a Financial Aid Specialist. The work is performed under the administrative direction of the Principal for Career and Technical Education/Workforce Development and Community Learning Office. A Case Manager/Financial Aid Specialist does related work as required.

TYPICAL WORK ACTIVITIES:

- Complete intake procedures with all students attending GED Test Prep programs based on NYSED requirements;
- Perform periodic check-ins with High School Equivalency (HSE) students to assess any challenges they are facing attending classes and offer solutions (transportation, other class times/locations, etc.);
- Perform exit interviews with GED participants and help the students with planning for the future;
- Work with adult students in person, classroom settings and via phone and email;
- Communicate job opportunities to students periodically during the program but especially near the end of the program;
- For longer programs (e.g. Adult CTE, Dental Assisting), perform periodic check-ins with each individual student to discuss the program and any challenges they are experiencing and help find solutions to those challenges;
- Meet with students to discuss Financial Aid and other funding opportunities;
- Assist students with completing the required information to submit for financial aid;
- Provide the Business Office the information they need to drawdown financial aid for each student;
- Complete required paperwork for student drops or additional funding as needed;
- Attend required trainings for Case Manager and similar programs and stay current with credentials as a Financial Aid Specialist;
- Assist with the compilation of data for the annual reporting for adult students.

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS: The individual must have strong written and verbal communication skills, must have a willingness to learn, must be able to get along with people and must have a customer service mindset.

MINIMUM QUALIFICATIONS: Graduation from high school or possession of a high school equivalency diploma and either:

A) Possession of at least an associate degree;

OR

B) Two (2) years of work experience in a position assisting members of the public with financial aid or involving substantial communication with the public. Substantial communication involves persuasion, negotiation, explaining, or counseling. This experience must have involved the exercise of judgement in dealing with or responding to another person. (Typical jobs involving this experience may include customer service representatives, people providing personal services, people providing social services, interviewers, counselors, and similar jobs involving periodic confrontation with a client, customer, member of the public, etc.).

NOTE: Your degree must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education. If your degree was awarded by an educational institution outside the United States and its territories, you must provide independent verification of equivalency. A list of acceptable companies who provide this service can be found on the New York State Civil Service website. You must pay the required evaluation fee.

SPECIAL REQUIREMENT FOR APPOINTMENT IN SCHOOL DISTRICTS / BOCES: Per regulations of the Commissioner of Education, to be employed in a position designated by a school district or BOCES as involving direct contact with students, a clearance for employment from the State Education Department is required.

CATTARAUGUS COUNTY CIVIL SERVICE

Adopted: 5/2/23

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