Staff Training and Development: Where to Start

PRESENTED BY ERIN M. DIXON
Today’s Agenda

- Background
- New Hire Training
- Continuing Training
- Professional Development
Background

• Training and Development position
  • Created in July 2017

• Size and scope
  • 83 individuals employed in our financial aid office
    • 36 new staff in past 3 years
    • 70% of staff respond to student/parent questions
  • 59 financial aid campus colleagues
What’s our *training need*?
Background

• Interviewed stakeholders
  • Newest new hires

- Timeliness
- Organization
- Environment
- Preparedness
Background

- Interviewed stakeholders
  - Individual Office teams

Reminders

Timely fixes

News/Updates

Professional Development
Background

• Interviewed stakeholders
  • Leadership team

- Centralized
- Effective
- Timely
- Cross-training
Background

• Research

October 7-9, 2019  PASFAA 2019 – HARVESTING KNOWLEDGE
New Hire Training

• Financial Aid generalist goal
  • No prior aid experience
  • 25+ modules over 12 weeks
  • Begin 1-2 weeks after hire
  • Shadowing Program

• Learner-based training
  • Need to know
  • Practice, practice, practice
New Hire Training

- Introduction Courses

- Student System Basics
  - 1 hour

- Office of Student Aid 101 Part 1
- Office of Student Aid 101 Part 2
- Office of Student Aid 101 Part 3

10 hours over 3 days
New Hire Training

• Modules

- FERPA / Safeguarding Data
- Introduction to Scanning Room
- Student Aid Web Presence
- FAFSA

- Calculating the EFC
- Eligibility for Federal Student Aid
- SAP – Part I: An Introduction
- Verification, Certification, Conflicting Information

- COA, Awarding, Disbursement
- Direct Loans
- Overawards
- Federal Pell Grant
# New Hire Training

## Modules

<table>
<thead>
<tr>
<th>PA State Grant &amp; Special Programs</th>
<th>PLUS Problem Solving</th>
<th>University Loans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Work-Study</td>
<td>SAP: Part II</td>
<td>Withdrawing</td>
</tr>
<tr>
<td>Private Alternative Loans</td>
<td>Open IT Training</td>
<td>Campus Commonwealth</td>
</tr>
<tr>
<td>Scholarships / Special Programs</td>
<td>Professional Judgment</td>
<td>Email Session</td>
</tr>
</tbody>
</table>
New Hire Training

• Modules for Student/Parent Interactions

- Front Desk / Phone Procedures
- Verifying Identity
- Hands-On Exercise
- Handling Difficult Conversations
Subject Matter Experts (SMEs) have something called ‘unconscious competence.’ They are so good at what they do that they don’t know how or why they do it...

... We need SMEs. They provide the content for our learning experiences, credibility with our audience, and answers to the toughest questions. But in the classroom? Let a professional drive. “

- The Learning & Development Book by Tricia Emerson & Mary Stewart
New Hire Training

• Role of SMEs
  • Approve training material
  • Attend sessions
  • Answer questions
  • Provide examples

• Role of Trainer
  • Develop training material
  • Run the training session
  • Schedule / organize training
New Hire Training

• Module Outline
  • 60-90 minutes
  • Definitions
  • System screens
  • Minimal text
  • Real student/parent questions
  • Practice opportunities
  • FSA eTraining modules (related)
New Hire Training

Shadowing Program
- 10 week program (3 hrs/wk)
- Assigned staff to shadow
- 2 weeks reverse-shadowing
- 1 week with life-line
New Hire Training

- Material is Available

New Hire Material

- Financial Aid Acronyms and Abbreviations
- Financial Aid Resources
- Training: COA, Awarding/Packaging, and Disbursement
- Training: Direct Loans
- Training: Document Processing Area
- Training: Eligibility
- Training: FAFSA
- Training: Federal Methodology - EFC
- Training: Federal Work Study
- Training: FERPA and Safeguarding Data
- Training: Handling Difficult Conversations
New Hire Training

• Material is Available

Financial Aid Acronyms and Abbreviations

by Erin Dixon — published a year ago, last modified 2 months ago — History

Your guide to commonly used office abbreviations and acronyms. Use the search feature at the top of the page and select "only in current location" to find a particular abbreviation or acronym.

<table>
<thead>
<tr>
<th>Acronym / Abbreviation</th>
<th>Definition</th>
<th>Pronunciation</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAI</td>
<td>Adjusted Available Income</td>
<td>A-A-I</td>
</tr>
<tr>
<td>ACH</td>
<td>Automated Clearinghouse</td>
<td>A-C-H</td>
</tr>
<tr>
<td>ADA</td>
<td>Americans with Disabilities Act</td>
<td>A-D-A</td>
</tr>
<tr>
<td>AES</td>
<td>Application &amp; Eligibility Services (team in the University Park OSA)</td>
<td>A-E-S</td>
</tr>
<tr>
<td>AGI</td>
<td>Adjusted Gross Income</td>
<td>A-G-I</td>
</tr>
<tr>
<td>ALT</td>
<td>Alternative Loan</td>
<td>Alt</td>
</tr>
<tr>
<td>AOC</td>
<td>Aid-over-cost (refers to type of overaward)</td>
<td>A-O-C</td>
</tr>
<tr>
<td>APA</td>
<td>Asset Protection Allowance</td>
<td>A-P-A</td>
</tr>
</tbody>
</table>
New Hire Training

• Feedback
  • 2-3 weeks after training
  • What can’t you answer?
  • What was missing in training?
  • Suggestions for improvement
Continuing Staff Training

• Our Huddles
  • Bi-weekly
  • Recorded
  • Published material
  • Remote participation
  • Agenda
  • Updates / Announcements
  • Just-in-time training
Our Huddle “Minis”
Huddle “Mini” topics

- FERPA
- Withdrawals
- Checking Eligibility
- Safeguarding Data
- Tracing Disbursements
- Direct Loan Grade-Level Changes
- IASG & Children of Fallen Heroes
- Weekly Processing
Kahoot!

Define SAP.

18 Successful Academic Progress

Satisfactory Academic Progress

Successful Academic Program

Satisfactory Academic Program

https://kahoot.com
Continuing Staff Training

- Our **Checklists**
  - On Intranet
  - Sorted by financial aid topic
  - Commonly asked questions/issues
  - Step-by-step instructions to arrive at a solution or when to refer to an expert.
Continuing Staff Training

Federal and State Programs - 44310 SME Queue

FWDFED - Document before transferring the call.

- Federal Direct PLUS Loan
- Federal Direct Sub/Unsub Loan
- Alternative Loans
- Grants
- Workstudy
- University Loans
- Overawards
- Study Abroad

October 7-9, 2019

PASFAA 2019 – HARVESTING KNOWLEDGE
Continuing Staff Training

Workstudy

by [Redacted] published 2 years ago, last modified 6 months ago — History

Awarded FWS - Finding a Position
Awarded FWS - Funds left to earn
Not Awarded FWS

Awarded FWS - Finding a Position

Main Menu > Penn State WorkCenters > Financial Aid > Intake WorkCenter > Student Services Ctr

1. Did the student accept the award in LionPATH?
   - Yes - move to step 3
   - No - move to step 2

2. Student must accept the award before searching for a job.
3. Did the student accept today?
   - Yes - advise he/she must wait one business day before searching for a job
   - No - move to step 4
Continuing Staff Training

• Regional Training
  • Visit two campuses (east/west)
  • Full-day training
  • SMEs attend/present
  • Content based on submissions

• Annual Student Aid Training
  • Two day event
  • Content based on submissions
  • All student aid staff invited
Professional Development

• Section of Intranet
  • Conferences
  • Federal Student Aid Trainings
  • Penn State Opportunities
  • Webinars
  • Podcasts
Professional Development

• Calendar
  • Intranet homepage
  • Webinars, conferences, etc.
  • Time, location, and summary
  • Kept current
What's next...?
Thank you!

Erin M. Dixon
Assistant Director of Compliance & Training, Office of Student Aid
Penn State University

emn129@psu.edu

QUESTIONS?

October 7-9, 2019

PASFAA 2019 – HARVESTING KNOWLEDGE