



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

News/Updates

Timely fixes

Professional
Development

Background



- Interviewed stakeholders
 - Leadership team

Centralized

Effective

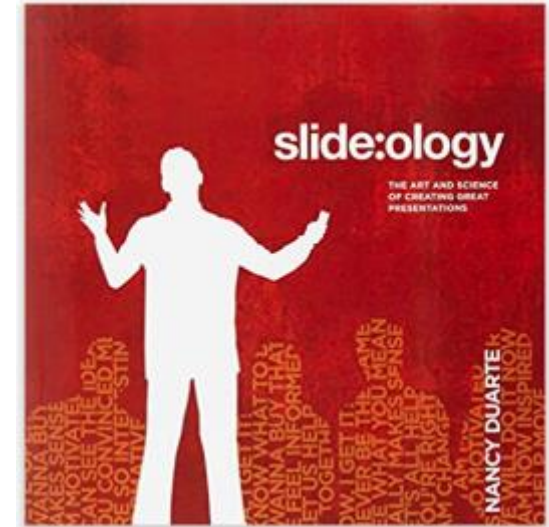
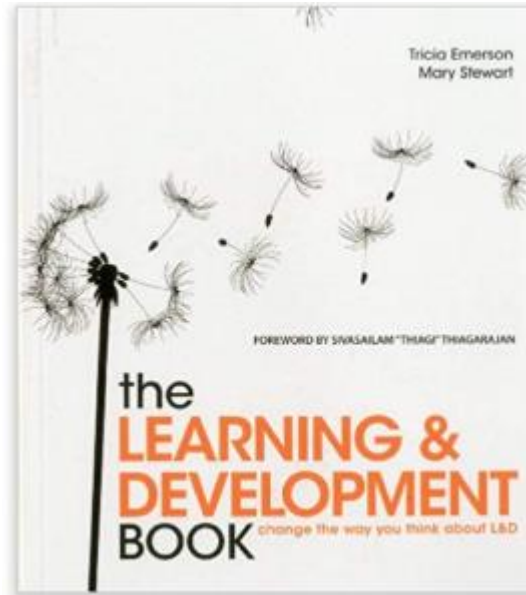
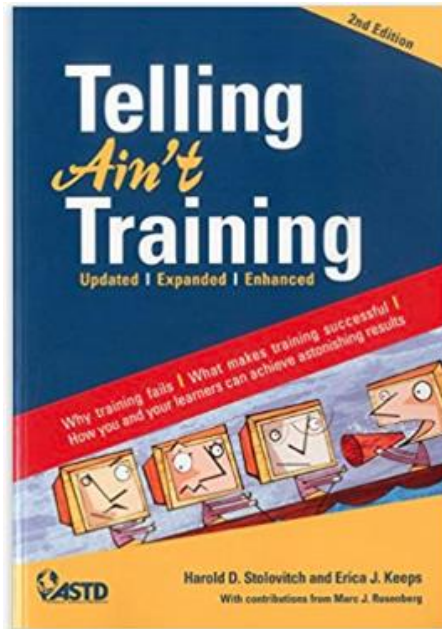
Timely

Cross-training

Background



- Research



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	Calculating the EFC	COA, Awarding, Disbursement
Introduction to Scanning Room	Eligibility for Federal Student Aid	Direct Loans
Student Aid Web Presence	SAP – Part I: An Introduction	Overawards
FAFSA	Verification, Certification, Conflicting Information	Federal Pell Grant

New Hire Training



- Modules

PA State Grant & Special Programs	PLUS Problem Solving	University Loans
Federal Work-Study	SAP: Part II	Withdrawing
Private Alternative Loans	Open IT Training	Campus Commonwealth
Scholarships / Special Programs	Professional Judgment	Email Session

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

Home > Training > New Hire Material

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.

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

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

Tracing Disbursements

Withdrawals

Direct Loan Grade-Level
Changes

Checking Eligibility

IASG & Children of
Fallen Heroes

Safeguarding Data


Weekly Processing

Kahoot!



Define SAP.

18



8
Answers

<input type="checkbox"/> Successful Academic Progress	<input checked="" type="checkbox"/> Satisfactory Academic Progress
<input type="radio"/> Successful Academic Program	<input type="checkbox"/> Satisfactory Academic Program

Exit preview < 2 of 2 >

<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
IUG			

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

October 2019						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2



What's next...?

Thank you!

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QUESTIONS?