



*Traveling Through*



# Uncharted Territory

**SWASFAA | TASFAA**  
Conference 2023



# Training for New Frontline Financial Aid Representatives

PRESENTED BY  | Baylor University  
ONE STOP



# A little bit about Baylor One Stop

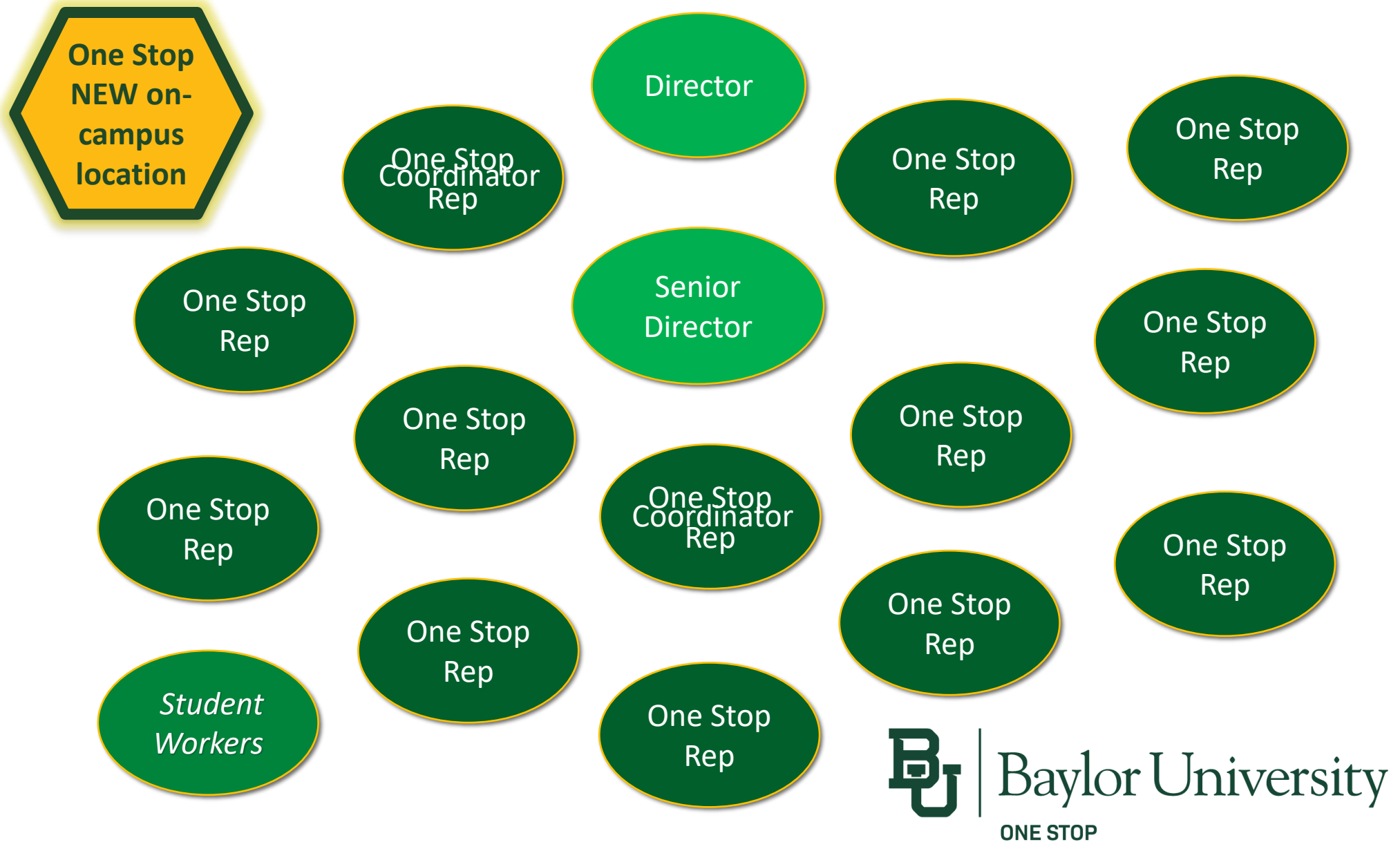


- Chartered in 1845
- 20,800 Students (15,200 Undergraduate)
- Private, Christian, R1 Institution, NCAA Div. 1
- Waco, TX (Population 140,000)
- 2023-24 UG COA= \$75,360
- 90% receive financial aid
- 8% Students receiving Pell
- 36.5% Minority representation is freshman class
- 60% UG from Texas
- Traditional UG (freshman required to live on campus)
- Traditional Grad, Online Grad/Professional, Law, Seminary
- Semester, Trimester, Quarter, Modules (six 8-week periods)
- SAY and BBAY
- Federal, State, and Institutional funds awarded
- FAFSA and CSS Profile required for new students

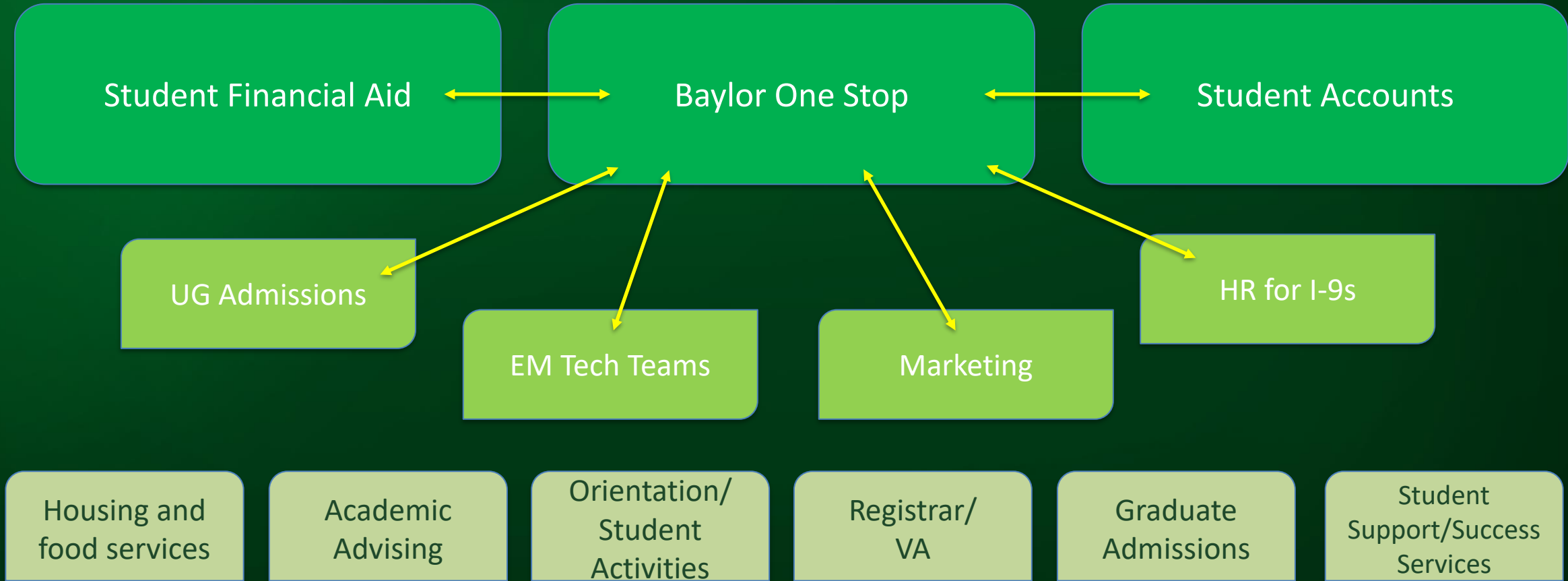


- Officially Opened October 2021
- Reports to Enrollment Management
- Enrollment Management includes:
  - UG Admission
  - Financial Aid
  - Student Accounts
  - Marketing
  - Ops/Tech
  - Data/Research
  - One Stop
  - Admin
- In-person, Remote, Hybrid Staff
- On-Campus One Stop location opened January 2023
- Staff size tripled in 2 two years
- Staff experience ranges from 3 months to 30 years

July 2021 → October 2021 → December 2021 → Fall 2022 → January 2023 → Summer 2023



# Baylor One Stop Collaborations



# Stats



**In-person visits since opening  
new location January 17, 2023**

Total visitors **3,532**

- 1-on-1 Meeting with frontline staff **2458**
- Document or payment drop-off **584**
- I-9s and Notary **490**



**Email Responses since  
January 1, 2023**

Email Responses Total **18,700**

- Financial Aid **66%**
- Student Accounts **34%**



**Phone calls during peak  
June 22<sup>nd</sup> - August 22<sup>nd</sup>**

**11,527** Total calls completed

- No Voicemail
- Phones open 9AM-4PM

# What were we looking for in a frontline rep

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- Bachelor's degree or equivalent combination of training and experience
- Less than one year to three years experience
- Proficient written and verbal communication skills
- Excellent interpersonal skills and the desire to work with people
- Experience in customer service
- Problem-solving and critical thinking skills
- Ability to maintain professionalism under varying circumstances
- Professional telephone etiquette
- Organizational skills and attention to detail
- Ability to handle multiple tasks simultaneously
- Proficiency with personal computers & technology
- Ability to understand and explain complex information and processes
- Experience in handling and communicating sensitive information
- Knowledge of financial aid counseling, verification, federal student loans, billing, admissions and/or registrar (Preferred)
- Knowledge of an enrollment management area focusing on outreach and/or retention (Preferred)
- Bilingual (Preferred)

# Honesty in what the job entails

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- Maintaining a positive and professional attitude while answering phone calls for up to six hours per day
- Understanding and interpreting the needs of students while providing quality, personalized customer service for all enrollment service areas
- Maintaining a working knowledge of federal and institutional financial aid regulations and policies
- Representing and adhering to Baylor's values and policies
- Being available to meet with students and their families
- Giving small group financial aid presentations
- Managing daily correspondence and inquiries pertaining to students
- Navigating confidential student information across multiple systems
- Documenting interactions with students
- Determining the quickest, most effective ways to answer a student/parent question and efficiently escalating inquiries and concerns as needed
- Troubleshooting common issues with technology and student account access
- Attending ongoing trainings on federal, state, and institutional regulations regarding financial aid and student accounts
- Maintaining regular and punctual attendance
- Performing other duties as assigned to support the needs of the Enrollment Management Office



# Training Goals

Can be done in-person, hybrid, or remote

4-6 weeks of training

Start on phones by week 4

Fully added to the schedule by week 7

Presentation training was secondary

Incorporate Partner Teams

Use your own staff

Use Internal and external training modules

Include check-in and independent time

Get feedback from the new employee

- Assess your training
- Assess their needs

# Systems We Use

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- Microsoft TEAMS chat
- Microsoft TEAMS Channels
- Microsoft OneNote
- Box Drive
- Ellucian Banner
- Banner Self Service Global Proxy
- Banner Communication Management
- OnBase Inquiry Form
- OnBase Forms and Workflow
- COD
- ELMOne
- Crystal Reports
- Power BI
- EAB Navigate
- NASFAA, TASFAA, SWASFAA
- TouchNet
- E-bill (Emulate Student Option)
- CSGold (Meal Plan usage)
- Guardian (I-9s)
- Five9s (phones)
- Ocelot (Chatbot)
- Slate- UG Admissions
- Slate- One Stop
- Receptionist (In-Person Queuing)

# System's training

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**In most financial aid offices multiple systems and logins are unavoidable.**

- How can you make this more manageable for new staff?
- What needs to be introduced first? What can wait?
- Are you training on a system they do not have access to yet?
- Who manages the systems' access and confirms that staff are able to actually log in?
- Which systems have special password requirements?
- Which systems have known password expirations?
- Does the new staff member have the appropriate training and understanding of cyber security before gaining access to a system?
- Is system training done by IT, supervisors, or the everyday user? Maybe all three could offer insight?
  - Sometimes new people learn things about systems from other offices or users that could be helpful to our staff
  - Updates, shortcuts, bookmarks

# First Day reminders

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The first day can be overwhelming and long for a new staff member. Especially for young staff or those transitioning to their first full time position. Be mindful of how much you introduce in the first day.

If you include a lunch that is great, but also means the new staff get no break/personal time.

Do they have their technology on the first day? If not where and how will they access any online training?

- If they do have technology consider giving them some “down time” with their computer to set up their email preferences and signature.
- Send them your format for email signature and your school logo. This gives them an official task they can complete AND makes them feel like they are part of the institution. They likely will start getting emails immediately, so feeling part of your organization or department is crucial.
- Making sure they are able to get their staff ID is another good way to make them feel included and official. Build time in the schedule to do this. (Parking pass, keys, swag)

How do you welcome a new staff member?

- Send an email or text message the week/night before to give them a contact if they have any questions or concerns.
  - You could ask for a photo and bio and then send it out on the first day, so they get welcome messages from across your department
- Where do they go, parking, expected start time, and the first-day schedule should be sent ahead of time
- Remember to check with HR to see how much time is needed for any University required training or onboarding
- Having a conversation with your current team about making an impact on new staff

# Different training options

## Resources

- FSA Training Modules
- NASFAA
- SWASFAA Boot Camp
- TASFAA New Aid Officers
- Online recorded Conference sessions/Power points (FSA, NASFAA, TASFAA, SWASFAA)

## Strategies

- Supervisor to new staff
- Mid-level staff to new staff
- Staff to new staff
  - Opportunity for networking
  - Can test out current staff abilities as a mentor/trainer
- Partner offices to new staff

# Training Remote/Hybrid Workers

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## Technology

- Can you get it to them in time to train?
- If they do not have a work-issued computer what can they do/access in the meantime?
- How can you make sure they meet the whole frontline team?
- If Hybrid:
  - consider scheduled days in the office and plan accordingly
  - Make sure they get what they need while in the office
  - What do they need to bring with them? What is the set-up of space when they come in to train?
- If fully remote
  - Send them a care package (swag, office supplies, name tag, headset, batteries)
  - Make sure they get face-to-face time with their supervisor
  - Are there channels for them to engage with co-workers (professional and casual/social)
  - Make sure they do not hesitate to contact IT when having a technology issue
  - Mix up the trainings (1 on 1, small group, large group)
- Asynchronous and Synchronous options
- Be upfront with expectations for remote employees. If this is not handled by HR then this is your opportunity to set the tone before bad habits happen. Is the job description altered at all for remote staff?
- In-person staff may be able to pick up on your culture, expectations, and procedures simply by being around and observing. Can you create a similar experience for remote staff?

# Week 1 sample schedule

	Monday - May 22nd	Tuesday - May 23rd	Wednesday - May 24th	Thursday - May 25th	Friday - May 26th				
8:00	One Stop Welcome/Intro/Coffee/I-9 Verification	OneNote	FSA - Federal Student Aid Overview	I-9 Training / Remote Best Practices	Touchbase w/ Taryn				
8:30		Domestic Counseling Overview/Funnel Training			Financial Aid Counseling Overview	President Livingstone Conversation	FSA - Packaging and Pell & Loan Concepts		
9:00	Bear Essentials		FSA - The Student Aid Application Process	CSS Profile/CollegeBoard Overview				<a href="#">Customer Service &amp; Communication Standards</a>	
9:30									International Admissions Overview
10:00							Admissions Transfer Team Overview		
10:30	Financial Aid 101	EM Marketing Overview	<a href="#">Professionalism</a>	IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)	<a href="#">Eligibility Playlist</a>				
11:00		FSA - Federal Student Aid Overview	Lunch	IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)	<a href="#">Loan Programs Playlist</a>				
11:30	New Hire Lunch	Lunch			Lunch	Lunch			
12:00			WUAC Overview & Recruitment Events	IFAP Handbook - Ch. 1 - The Application Process: FAFSA to ISIR			Understanding the FAFSA & Applying for Financial Aid Video Playlist	<a href="#">13 Attributes</a>	
12:30	EM Overview	Processing & Loans Team Overview			Student Accounts Team/Comms Overview				
1:00			Diversity & Inclusion Training	Scholarships Team Overview		FSA/IFAP Catch-Up			
1:30	Computer Set-Up	Federal Processing Team Overview			IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)				
2:00			Office Necessities	Tech Team Overview		IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)			
2:30	Office Essentials & Expectations / Looking Forward	FSA - Federal Student Aid Overview			IFAP Handbook - Ch. 2 - Filling out the FAFSA		<a href="#">CSS Profile &amp; Scholarships Playlist</a>		
3:00			FSA - Federal Student Aid Overview	IFAP Handbook - Ch. 2 - Filling out the FAFSA		IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)	<a href="#">Watch Joint Training - Summer and 2324 Loans</a>		
3:30	FSA - Federal Student Aid Overview	IFAP Handbook - Ch. 2 - Filling out the FAFSA			IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)		<a href="#">Loans</a>		
4:00			FSA - Federal Student Aid Overview	IFAP Handbook - Ch. 2 - Filling out the FAFSA		IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)		<a href="#">Loans</a>	
4:30	FSA - Federal Student Aid Overview	IFAP Handbook - Ch. 2 - Filling out the FAFSA			IFAP Handbook - Ch. 3 - Expected Family Contribution (EFC)		<a href="#">Loans</a>		
	Meeting with a human								
	Individual work								
	Open								
	Lunch								
	Recorded Session								

# What we provide with the training schedule

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## Training links:

IFAP Handbook - <https://fsapartners.ed.gov/knowledge-center/fsa-handbook/2022-2023>

- After following this link you will click on “Application and Verification Guide”
- You will be reading through all 5 chapters

FSA Trainings - <https://fsatraining.ed.gov/>

- 1) Click on “Training Courses” and select “FSA Basic Training for New Staff”
- 2) Log in and then scroll down to the middle of the page where you will see icons for the different lessons you are to complete

Playlist Videos - <https://baylor.financialaidtv.com/>

- If the excel block has “playlist” at the end you will be watching a video playlist from the above link

OneNote - [One Stop Knowledge Base](#) ([Web view](#))



# Week 2 sample schedule

	Monday - May 29th	Tuesday - May 30th	Wednesday - May 31st	Thursday - June 1st	Friday - June 2nd
8:00	Memorial Day!	Touchbase w/ Justin	Check-in/Touchbase & EFC Hand-calculation & FAFSA Then and Now	One Stop Team Meeting	Touchbase w/ Justin
8:30		<a href="#">Scholarship Universe</a>			Admissions Timeline
9:00		FSA - Managing the Campus-Based Aid Programs		FSA - Student Departures	
9:30			Federal Work-Study Overview		
10:00				Financial Wellness Overview	Bearweb
10:30		<a href="#">Review Baylor Admissions Website</a>			
11:00		Lunch	Lunch	Lunch	Lunch
11:30					
12:00		IFAP Handbook Ch. 4: Verification, Updates, and Corrections	<a href="#">Watch Withdrawals Video</a>	OneNote Review	TouchNet
12:30			ELM/COD/BIL/NSL/EPROM Overview	SAP/SAP Appeals	
1:00				Baylor Financial Aid Appeals	Student Accounts Banner Introduction
1:30		FSA - Cash Management	IFAP Handbook Ch. 5: Special Cases		
2:00			Collections Overview	FSA/IFAP Catch-Up	
2:30		OneNote/OneStop Website Review			
3:00					
3:30					
4:00					
4:30					
	Meeting with a human				
	Individual work				
	Open				
	Lunch				
	Recorded Session				

# Week 3 sample schedule

	Monday - October 24th	Tuesday - October 25th	Wednesday - October 26th	Thursday - October 27th	Friday - October 28th
8:00	IFAP/FSA Catch-Up	CARE Team Overview	IFAP/FSA Catch-Up	BBAY Training	Food Insecurity & Baylor Resources (The Store and Farmers Market)
8:30					Campus Tour
9:00	Shadow Billy	Honors College Presentation	Student Accounts Banner Overview	Hand-Calculating EFC (FM/IM) & PJ Adjustment	Recruitment Events/Scholarship Events/Housing
9:30		Professional Judgment/Special Circumstances			Multicultural Affairs
10:00		Cell Chart Overview			Lunch & View One Stop Space @ SUB
10:30	Diversity Training		Shadow Billy	Lunch	Admissions Presentation
11:00	Lunch	Lunch	Lunch	Ignite: Cyber Security, Benefits, Title IX (Crucial Conversations)	Financial Literacy
11:30					Outlook Signatures/Zoom/Key Pick-Up
12:00	Shadow Maggie	Shadow Sam		One Stop Won't Stop	FA Presentation @ WUAC
12:30	Shadow Sam	Shadow Colton	Admissions Timeline Training		
1:00			Slate		
1:30			IFAP/FSA Catch-Up/OneNote Review		
2:00		IFAP/FSA Catch-Up			
2:30					
3:00					
3:30					
4:00					
4:30					

# Week 4 sample schedule

	Monday - October 31st	Tuesday - November 1st	Wednesday - November 2nd	Thursday - November 3rd	Friday - November 4th		
8:00	CU Time w/ Colton	Study Abroad Financial Aid Opportunities	Gayle OUT - Cole Shadow Colton	One Stop Team Meeting	CU Time		
8:30		Shadow Maggie			Shadow Cynthia		
9:00				Shadow John Dan			
9:30					Shadow West		
10:00	Shadow Colton (Phones)						
10:30							
11:00	Shadow Maggie	Shadow Cynthia	Lunch	Shadow Cynthia			
11:30							
12:00	Lunch	Lunch	Front Desk	Lunch	Lunch		
12:30							
1:00	OnBase Set-Up & Individual CU Time	Shadow Rick			Shadow Cynthia	Shadow John Dan	
1:30							
2:00	Shadow Billy			Shadow West			
2:30							
3:00		CU Time w/ Cynthia	Gayle OUT - Cole Shadow Colton	Verification	CU Time w/ Cynthia		
3:30							
4:00	CU Time w/ Billy						
4:30							

# Daily schedule showing new staff in training (Week 4)

	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30
Billy	CUs	CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	LUNCH	LUNCH	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT
Cynthia	CUs	CUs	Phones	Phones	Phones	Phones	CUs	CUs	Phones	Phones	Phones	Phones	LUNCH	LUNCH	CUs	Phones	Dept. Wor	CUs
Colton	CUs	CUs	BOS2/Pho	BOS2/Pho	BOS2/Pho	CUs	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	LUNCH	LUNCH	Phones	Phones	Dept. Wor	CUs
Maggie	CUs	CUs	CUs	CUs	CUs	CUs	CUs	Phones	Phones	Phones	Phones	LUNCH	LUNCH	Phones	CUs	CUs	Dept. Wor	CUs
Samantha	CUs	CUs	CUs	CUs	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	Phones	Phones	Phones	CUs	CUs	Dept. Wor	CUs
Gayle	CUs	CUs	Phones	Phones	CUs	CUs	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	Phones	Phones	CUs	Dept. Wor	CUs
Cole	CUs	CUs	Presentati	Presentati	CUs	CUs	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	LUNCH	LUNCH	CUs	CUs	Dept. Wor	CUs
Titus	CUs	CUs	Phones	CUs	CUs	Phones	Phones	Phones	LUNCH	LUNCH	BOS2/Pho	BOS2/Pho	BOS2/Pho	BOS/CUs	BOS/CUs	BOS/CUs	Dept. Wor	CUs
Ryan	CUs	CUs	Phones	Phones	Phones	CUs	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	LUNCH	LUNCH	BOS2/Pho	BOS2/Pho	Dept. Wor	CUs
Natalia	CUs	CUs	CUs	CUs	CUs	Phones	Phones	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	Phones	Phones	Dept. Wor	CUs
Amy	Training	Training	Training	Training	Training	Training	Training	LUNCH	LUNCH	Training	Training	Training	Training	Training	CUs	CUs	CUs	CUs
Sarah	Training	Training	Training	Training	Training	Training	Training	LUNCH	LUNCH	Training	Training	Training	Training	Training	CUs	CUs	CUs	CUs
Jana	Training	Training	Training	Training	Training	Training	Training	LUNCH	LUNCH	Training	Training	Training	Training	Training	Training	Training	Training	Training

- Celebrate once you add new staff to the daily schedule.
- Start scheduling time where they actually get to jump in and do a little bit of the job.
- Consider who is on the phones at the same time and who is off and available as a resource/mentor/supporter. If other staff is training them make sure to mark them in training as well
- Reverse shadowing/phone monitoring is important in the first few weeks on the phone.

# Daily schedule showing new staff in training (Week 5)

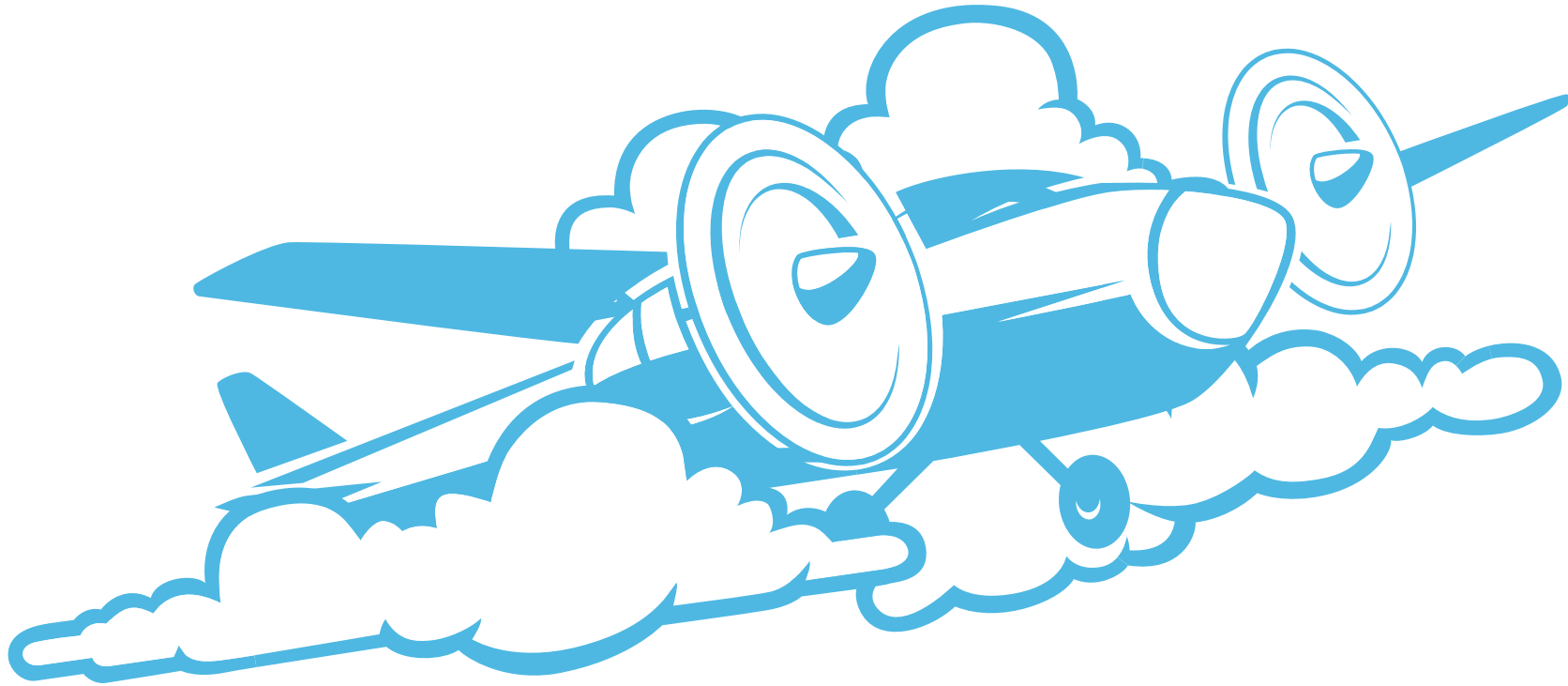
	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30	Phone Hours
Billy	CUs	CUs	CUs	CUs	CUs	Phones	Phones	BOS2/Pho	BOS2/Pho	LUNCH	LUNCH	CUs	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	CUs	2
Cynthia	CUs	CUs	CUs	CUs	CUs	Phones	Phones	Phones	Phones	Phones	Phones	Phones	LUNCH	LUNCH	CUs	CUs	Dept. Wor	CUs	3.5
Colton	CUs	CUs	BOS2/Pho	BOS2/Pho	BOS2/Pho	BOS2/Pho	BOS2/Pho	LUNCH	LUNCH	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	Dept. Wor	CUs	2.5
Maggie	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	OUT	0
Samantha	CUs	CUs	CUs	CUs	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	Phones	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	Dept. Wor	CUs	3
Gayle	CUs	CUs	Phones	Phones	CUs	CUs	LUNCH	LUNCH	Phones	Phones	Phones	Phones	Phones	Phones	CUs	CUs	Dept. Wor	CUs	4
Cole	CUs	CUs	Phones	Phones	Phones	CUs	CUs	CUs	Dept. Wor	CUs	Phones	Phones	CUs	CUs	Phones	Phones	OUT	OUT	3.5
Titus	CUs	CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	BOS/CUs	LUNCH	LUNCH	CUs	Presentati	Presentati	Presentati	CUs	Dept. Wor	OUT	0
Ryan	CUs	CUs	Phones	Phones	Phones	CUs	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	CUs	CUs	CUs	Dept. Wor	CUs	4
Natalia	CUs	CUs	CUs	CUs	CUs	CUs	Phones	Phones	Phones	Phones	LUNCH	LUNCH	Phones	Phones	Phones	Phones	Dept. Wor	CUs	4
Amy	CUs	CUs	CUs	CUs	CUs	CUs	CUs	CUs	LUNCH	LUNCH	CUs	CUs	Phones	Phones	Phones	Phones	Dept. Wor	Dept. Wor	2
Sarah	CUs	CUs	CUs	CUs	CUs	CUs	CUs	CUs	LUNCH	LUNCH	CUs	CUs	Phones	Phones	Phones	Phones	Dept. Wor	Dept. Wor	2
Jana	CUs	CUs	CUs	CUs	CUs	CUs	CUs	CUs	LUNCH	LUNCH	CUs	CUs	Phones	Phones	Phones	Phones	Dept. Wor	Dept. Wor	2

- Limited Phone time at the end of the day
- Veteran staff listening to calls and giving feedback.
- Emails is a great place for new staff to start because they have time to ponder a question, use resources to research an answer independently, draft a response and get feedback before responding.
- Pulling new staff into in-person meetings with students and parents. Start with shadowing then move to co-advising.

# Training Student Workers

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- Student workers may be the first interaction that students and families have with your office
- Reinforce professionalism expectations.
- Remind them they are not an “add-on” to the team but are vital members of the staff and the success of day-to-day operations and experiences for guests.
- Discuss dress code and presentation expectations. (look good, feel good, play good)
- Determine what daily roles your student workers have in your office flow and ensure they have access to the appropriate systems to execute tasks within their roles
- Utilize veteran student workers to help train/shadow new student workers. Veteran student workers know your office expectations and can help provide understanding
- Create a student worker agreement that clearly communicates duties, policies, and professionalism standards.
  - Helps set a standard of accountability early on
- Cut out time for a group training/opportunity to build relationships with one another. Often times students have different shift schedules so may rarely, if ever, have the chance to work alongside all other student workers



# Questions?