



From Zero to Trained: Onboarding and Training at High Speed

Jess Graham, IASFAA Awards Co-Chair &
Assistant Director, University of Iowa
Jacob Severn, Financial Aid Advisor, Iowa State
University

1

Agenda

- Roles/Office Structure
- Onboarding
- Training
- Team Culture
- Resources



2

Roles and Office Structures

- Jess and Jacob's Roles at U of I and ISU
 - Involvement with onboarding/training process
- Structure of Offices
 - Role of full-time employees
 - Role of student employees



3

Soup, Salad, or Sandwich?

- In groups of 2-3: Categorize each item as soup, salad, or sandwich
- Consider your "why"
 - Soup – Collection of ingredients that mix together to make a whole
 - Salad – Combo of distinct parts that are mixed
 - Sandwich – Structured form, typically with layers or something contained between two elements



4

slido



Join at slido.com
#2638719



① Start presenting to display the joining instructions on this slide.

5

slido



**When you were first hired, how
would you rate your own onboarding
& training?**

① Start presenting to display the poll results on this slide.

6

slido



What does onboarding mean to you?

① Start presenting to display the poll results on this slide.

7

slido



What happened during your onboarding process that was memorable? Positive or negative.

① Start presenting to display the poll results on this slide.

8

Interviews – First Step of Onboarding

- Virtual interviews with a colleague or “veteran” student staff
 - Less intimidating than a one-on-one (for me and the student candidate)

- Optimal questions to ask...
 - Consider your interview questions as screening for the perfect candidate
 - ISU Undergraduate Student Advisors primarily focused on Customer Service
 - But there’s more too Customer Service for Financial Aid



9

Onboarding

- **Onboarding checklist** (typically completed before or during their first day)
 - Offer letter and completing I9 are done with HR rep – this is the bulk of the support HR provides me (+ assisting with the pay raise and termination processes.)
- **First day onboarding**
 - Verbal confirmation that they still want to do this as a job
 - Review and sign expectations of the job (dress code, timeliness, downtime)
 - Office tour
 - Safety discussion: where are tornado shelters, where to go in case of a fire, active shooter

My Onboarding Checklist

Wednesday, September 11, 2024 12:25 PM

- Create offer letter, send I-9 info and appointment set up form (must complete top 3 sections). And CC Alexa Lavin
- Add to When to Work and ask them to add their availability for the semester
- Email Adam about access to CC, OSFA email, Skype (with outbound calling capabilities) and Shared Drive.
- Add in Clarity Connect: Agent Management>Agent Bulk Import>to add user. Then Maintenance>Teams>to add roles.
 - Make sure they can listen in on calls.
 - [Adding users to Clarity Connect](#)
- Add in SWIPE
- Complete "get to know you" questionnaire and include photo for student poster
- Send OneNote Peer Advisor Manual (make sure they have editing access)
- Ask office staff to add new peer advisor on skype
- Share my calendar
- Make sure we have headsets. Order more if needed.
- Work on door access for peer advisor
- Have them sign up for UI Step (either fall or spring) once we know the dates



10

Work Agreement

- ISU OSFA utilizes a Work Agreement for all new and continuing student employees
 - Outlines our policies, procedures, & expectations for student staff
 - Requires students to read and initial next to each policy, procedure or expectation
- It's customizable!
- Completed each academic year
- Gives students the ability to refer to Work Agreement

OSFA Policies & Procedures

1. Security

Each office, including the front desk, is provided with a panic button under the desk. In the event of a security incident, you need to press both buttons at the same time to send a silent alarm to DPS. Along with panic buttons, each lobby area is equipped with a security camera. All full-time staff have access to view these cameras and should only be viewed for security reasons. Viewing of the cameras would be necessary to help monitor traffic in another area or in the event of a security incident in another area. Viewing of the cameras should not be monitor performance or personal use. If you notice that security cameras are being used for reasons other than outlined above, please discuss with your supervisor or other appropriate party. Guidance for personal safety and response plans in case of a crisis can be found on the "Emergency" tab on the Intranet.

Confidentiality

The same state and federal regulations that grants a student the right to access their record also protects their right to privacy. The regulations provide safeguards against release of information about students to third parties. Student financial aid information is considered confidential and protected under these regulations.

The information seen and heard in the Office of Student Financial Aid is protected under these regulations. Information that is overheard or disclosed to full-time and student staff members should remain private and only be shared with appropriate staff members within the office.



11

slido



What role do you have in the onboarding process?

① Start presenting to display the poll results on this slide.

12

slido



What are some challenges you had while being onboarded?

① Start presenting to display the poll results on this slide.

13

Training

• Training Student Staff at U of I

- Training checklists:
 - Training Topics (supervisor)
 - New Staff Training (peer advisors)
- Timeline – it depends!
- Training course (Canvas)
- Call/job shadowing
- Front Desk Training – 1st solo shift peer advisors will work
 - Safety Alert buttons (via Teams)

- FERPA Training
- Security Awareness Training
- Cash handling training
- Add availability in When to Work (if not already done for the entire semester)
- MAUI access request form
Download Duo Mobile. Instructions here: <https://its.uiowa.edu/support/article/115211>
- Set up Skype for Business and/or Teams
- Bookmark pages: (list is provided of commonly used webpages)
- ICON course



14

Training

Training at ISU:

- Training Course
- Shadowing
- Training Checkpoints
- Regular Meetings

1. In your own words, explain the Student Aid Index (SAI).
2. How is FAFSA Dependency determined?
3. What information/documents do students need to file a FAFSA?
4. In your own words, explain Cost of Attendance (COA).
5. What is a Cost of Attendance adjustment? Can we adjust COA for off-campus housing?
6. In your own words, explain Financial Need.
7. What are the requirements for first time loan borrowers:
 - a. For subsidized/unsubsidized borrowers?
 - b. For Parent PLUS loan borrowers?
 - c. For private loan borrowers?
8. What are origination fees and how do they affect federal loan borrowers?

- **What is the student's:**

- **Major/Program of Study?**
 - Program of Study affects tuition/fee rates, eligibility for certain aid (TEACH Grant, Iowa Workforce Grant, etc.)
- **Grade Level?**
 - Grade level affects tuition/fee rates, annual & aggregate federal loan limits, eligibility for certain aid
- **Student Aid Index (SAI)?**
 - SAI affects financial need, eligibility for need-based aid, Pell Grant eligibility
- **Dependency status?**
 - A student's dependency status affects federal loan annual limits, who can be verified using the FAFSA



15

Canvas Training > Workday Learning

- ISU OSFA has previously used a Canvas training course for new student staff to learn basics
 - Familiar to students – same as schoolwork
 - Ours is filled with office documents, scavenger hunts and videos.
 - Each module has a knowledge check so students and their supervisors can track progress or areas for improvement
 - Canvas also has insights to how long students spend on the training course.
 - It helps easily identify students who may need more direct encouragement to complete the training.



16

The screenshot shows the Blackboard LMS interface for 'FT Staff Training > Modules'. On the left is a red navigation sidebar with icons for Account, Dashboard, Courses, Calendar, Inbox, History, Studio, and Help. The main content area is titled 'FT Staff Training > Modules' and contains two expandable sections: 'Financial Aid Basics' and 'Website Scavenger Hunt'. The 'Financial Aid Basics' section includes 'Financial Aid Overview Videos', 'Financial Aid Adviser Overview', and 'Full-time Staff Competency Checklist.docx'. The 'Website Scavenger Hunt' section includes 'Website Scavenger Hunt' and 'studentaid.gov Website Scavenger Hunt'. At the top right, there are buttons for 'Collapse All' and 'Export Course Content'. On the right side, there are buttons for 'View Course Stream', 'New Analytics', 'View Course Calendar', and 'View Course Notifications'. Below these is a 'To Do' section with the text 'Nothing for now'. A purple notification bar at the bottom states: 'You are currently logged into Student View. Resetting the test student will clear all history for this student, allowing you to view the course as a brand new student.' The bottom right corner features the '2025 IASFAA CONFERENCE' and 'FAFSA AND FURIOUS' logos.

17

The screenshot shows the Blackboard LMS interface for 'Customer Service' modules. The left sidebar is identical to the previous screenshot. The main content area is titled 'Customer Service' and contains a list of modules: 'Customer Service Module', 'What is Customer Service? (0 pts)', 'Answering the Phones & Best Practices', 'Phone Customer Service Etiquette (0 pts)', 'Phone Service Etiquette Pt. 2', 'Active Listening (0 pts)', 'Reacting vs Responding', 'How to Deal with Difficult Conversations', and 'Customer Service Quiz (7 pts)'. A purple notification bar at the bottom states: 'You are currently logged into Student View. Resetting the test student will clear all history for this student, allowing you to view the course as a brand new student.' The bottom right corner features the '2025 IASFAA CONFERENCE' and 'FAFSA AND FURIOUS' logos.

18

IOWA STATE

Account

Dashboard

Courses

Calendar

Inbox

History

Studio

Help

• FAFSA

- Free Application for Federal Student Aid Learning Objectives
- Free Application for Federal Student Aid (FAFSA)
- StudentAid.Gov Accounts
- Student Aid Index (SAI)
- FAFSA Dependency
- Who should be on the FAFSA Form?
- Financial Information on the FAFSA Form
- FAFSA Quiz
10 pts
- FAFSA Filing
18 pts

You are currently logged into Student View. Resetting the test student will clear all history for this student, allowing you to view the course as a brand new student.

2025 IASFAA CONFERENCE

FAFSA AND FURIOUS

19

Workday Learning

- Transitioning from a Canvas training course to Workday Learning allows for more interactive videos and participation.
- Pulled information from existing Canvas course to create Workday Learning content
- Filled with lecture-style videos, direct links to resources, and knowledge checks
 - Able to prohibit skipping to ensure all content is watch
 - Add interactions into the lectures to emphasize key points and check comprehension



20

The screenshot shows a course page on the Iowa State University LMS. The course title is "Cost of Attendance (COA) and Financial Need". The description states: "This course explains the importance of Cost of Attendance in Financial Aid. We will explore the components of Cost of Attendance, Cost of Attendance adjustments, and create a foundation for understanding Financial Need." The course is currently "NOT STARTED" and has 6 lessons. The delivery mode is "Self-Directed". The contact person is Jacob M. Severn. The course is part of the 2025 IASFAA Conference and FAFSA AND FURIOUS.

Cost of Attendance (COA) and Financial Need

This course explains the importance of Cost of Attendance in Financial Aid. We will explore the components of Cost of Attendance, Cost of Attendance adjustments, and create a foundation for understanding Financial Need.

Lessons in This Course Additional Course Details

Completed 0/6

Lessons in This Course

Lesson	Description	Duration
1	Cost of Attendance and Need → This presentation breaks down the Cost of Attendance and explains its use within Financial Aid...	Video 14 minutes
2	Expense Estimator 🔒 This walkthrough will detail how to use the Expense Estimator found on the Office of Student Financial...	Video 7 minutes

[View as Admin](#)

2025 IASFAA CONFERENCE **FAFSA AND FURIOUS**

21

Weekly Meetings

- Each week, I reserved a conference room to hold a one-hour meetings with my student staff team.
 - With a new student information system, my meeting times were extended to one-hour but were previously half-hours.
- Gives us the opportunity to address topics discussed in full-time staff meetings and allows for continuous training.
- My meetings were structured as followed:
 1. General office updates
 2. Date and time sensitive material
 3. Training



22

slido



How has onboarding changed in your office over the years?

① Start presenting to display the poll results on this slide.

23

Team Culture

- Building trust through honest leadership
- 1:1 Meetings (each semester)
- Monthly meetings
- Designated spaces for student staff
- Graduation/finals weeks
- National Student Employment Week



24



25

THE ROOKIE OF THE YEAR AWARD

THIS AWARD IS PRESENTED TO

Ty Knudsen

Who has made a significant impact in OSFA and shown exceptional growth, dedication and promise during their first year as a peer advisor.

Jessie Graham
Student Supervisor

Vanessa West
Student Supervisor

National Student Employment Week Celebrations

THE CUSTOMER SERVICE SUPERSTAR Award

Presented to

Graycen Bates

For her exceptional service to students and families and always going above and beyond to meet their needs. Her customer service is an example of dedication, professionalism, and genuine care.

Jessie Graham
Student Supervisor

Vanessa West
Student Supervisor

26

Team Culture - Staff and Space Introductions

- On student's first day of work in our office, we give them an office tour and introduce them to our staff members.
- Between full-time and student staff, OSFA has about 60 team members.
- Giving the students a chance to visit with each staff member makes it easier for them to recognize staff in hallways, office suites, etc. It also helps ensure them that they are an integral part of our team!



27

slido



What tools/processes were most effective in your training?

① Start presenting to display the poll results on this slide.

28

Resources

- OneNote – Jess utilizes this resource for her student staff manual – also widely used across UI OSFA
 - (Almost) Daily updates are added into the Peer Advisor One Note with the expectation that they are checking this page at the start of each shift
- UI Step – Workforce Development Workshop for Students @ U of I

- Teams/ OneNote– Jacob also utilizes OneNote for an office wide Customer Service Manual
 - References to commonly asked questions and instructions for finding answers in our student information system
- ICYMI emails – Jacob sends ICYMI emails each Friday



29

Different Pit Crews, Same Finish Line: Hawks and Cyclones Train for Success



30

Questions?

Reach out to us!

Jess Graham (jessica-graham@uiowa.edu)

Jacob Severn (jacsev@iastate.edu)

