

# FINANCIAL AID LEADER LEARNING PATH

This Financial Aid Leader learning path guides financial aid team members in a sequence of online training courses focused on the job description.

## LEVEL 1: FOUNDATIONAL KNOWLEDGE

- Financial Aid Team Onboarding E-Training (3 hrs)** — This course focuses on the foundational knowledge, checklist, skills, and tools for this role. This course should be completed within the first 90 days of employment.
- Prevention Compliance** — These required compliance-related courses focus on key support compliance, Title IX, and FERPA, and must be completed within the first 90 days of employment. Refer to the compliance e-courses on The HUB for more information on continuing education compliance courses.
- Welcome to Our Culture (1 hr)** — Learn about the unique Paul Mitchell Schools culture and your role to sustain it.
- Time Management for Financial Aid (1 hr)** — Learn how to use the time management form with emphasis on financial aid tasks, and see examples of how a Financial Aid Leader can use the time management block.

## PRE-ENROLLMENT FINANCIAL AID

- Financial Aid 101 (3 hrs)** — This course is an introduction to federal student aid, types of student aid, and how to lead a financial aid planning session.
- Completing the FAFSA (1 hr 30 m)** — Learn the best practices for advising the prospective and current Future Professionals on completing the Free Application for Federal Student Aid (FAFSA).

## SCHOOL TOUR AND CAREER PLANNING SESSION

- School Tour (30 m)** — Learn the flow of the school tour and career planning session, how to customize the school tour, and how to use the School Tour and Career Planning Session Feedback Forms.
- Virtual School Tour (1 hr)** — Access guidelines and resources to help your team design and lead virtual school tours.
- Personal Interview and Career Planning Session (25 m)** — Learn how to prepare for the personal interview and career planning session, observe mentors asking powerful questions, and learn how to customize career planning sessions.
- Conducting a Financial Planning Session (40 m)** — This course focuses on how to guide the prospective Future Professionals in a financial aid planning session using the Financial Aid Possible Form.
- Virtual Financial Aid Meetings (1 hr 30 m)** — Explore digital communication platforms and learn how to design effective financial aid meetings.

## ENROLLING, CONTRACTING, AND VERIFICATION

- Enrolling and Contracting** — Learn the skills and steps to contract and enroll new Future Professionals. Practice and participate in every aspect of the information to streamline this process.
- Verifications 101 (1 hr)** — Refer to and read important documents and handbooks, and participate in an FSA e-training website training. Discover the hows and whys of the verification process and learn to recognize and overcome obstacles.
- Professional Judgement (1 hr)** — Discover the step-by-step process of professional judgments and determining when a professional judgment is applicable to a Future Professional. Learn the what, when, why, and how when exercising professional judgment, as well as which forms to complete and required documentation.

## FINANCIAL AID MANAGEMENT

- Building a Financial Aid File (1 hr)** — Learn how to assemble and maintain this file during the Future Professional's education and how to audit the files using the checklist.

## LEVEL 2: PRACTICAL APPLICATION

### ENROLLMENT FUNDAMENTALS

- Trusted Advisor (30 m)** — Learn how to intentionally and ethically build trust to strengthen your relationships with others and to enhance your performance.
- Powerful Questions (25 m)** — Discover the types of questions and how to use them in the pre-enrollment process.
- Features, Benefits, and the Benefit of the Benefit (30 m)** — Exercise critical-thinking skills and discover the features, benefits, and the benefit of the benefit.
- Gaining Commitment (1 hr)** — Explore the science of persuasion, micro-commitments, and ethical techniques for gaining the prospective Future Professional's commitment.
- Overcoming Objections (25 m)** — Discover the origins of objections and how to help the prospective Future Professionals find solutions to overcome them.

## LEVEL 3: MASTERY

### FINANCIAL AID DOWNLOADS

- Leading the Financial Aid and Operations Team Download Meetings (30 m)** — Learn how to inspect, manage, and communicate with the Financial Aid Leader and Operations Leader in the team download meetings.