

# FAFSA Lab Ambassador Training Curriculum Outline

## Purpose of the Tool

Work-study student employees hired for the Financial Aid Lab Ambassador position may have intimate familiarity with the financial aid process, but they still require a thorough training on all aspects of financial aid application submission, filing, and more. This curriculum outline is adapted from Fresno City College's financial aid lab ambassador training modules and may be adjusted to include information regarding institution-specific regulations and policies. The outline is meant to be filled in by the trainer with training activities and preexisting material from state- and institution- specific financial aid information. A recommended timeline of optimal seasons for training is also included.

Module One: Financial Aid 101	Topic Area	Recommended Month
Completing the FAFSA: <ul style="list-style-type: none"> <li>• Tax transcripts (include examples in reference binder)</li> <li>• Completing the FAFSA federal publication</li> </ul>	Aid 101	October (Session 1)
Types of Financial Aid: <ul style="list-style-type: none"> <li>• State aid</li> <li>• Federal aid</li> <li>• Federal work study</li> <li>• Loans (subsidized vs. unsubsidized)</li> <li>• Scholarships</li> </ul>	Aid 101	October (Session 1)
Basic Eligibility Requirements: <ul style="list-style-type: none"> <li>• Social Security Number, Citizenship</li> <li>• High school diploma, GED, high school equivalency, ability to benefit</li> <li>• Selective Service</li> <li>• Loan default</li> <li>• Eligible program</li> <li>• Make satisfactory academic progress</li> <li>• Graduate and professional students</li> <li>• Financial need</li> <li>• Attending two schools at once</li> </ul>	Eligibility	October (Session 1)
Dependency Status: <ul style="list-style-type: none"> <li>• Dependency status questions, proof of independence, special populations (foster youth, orphans, homeless)</li> <li>• Dependent children</li> </ul>	Eligibility	October (Session 2)
FAFSA Filing: <ul style="list-style-type: none"> <li>• Special cases in financial aid (e.g., My father claimed me on his taxes but I live with my mother)</li> </ul>	Eligibility	October (Session 2)
The Application Process & Cycle: <ul style="list-style-type: none"> <li>• FAFSA vs. state aid</li> <li>• Institution specific office timeline</li> <li>• Emails and notifications</li> </ul>	Process	October (Session 2)
Business Office Holds: <ul style="list-style-type: none"> <li>• Review each specific type of hold</li> </ul>	Process	October (Session 2)
Financial Aid Problems: <ul style="list-style-type: none"> <li>• Duplicate applications (FAFSAs and State Applications or other records)</li> <li>• SSN/PIN problems</li> <li>• Mismatched major/location</li> </ul>	Process	October (Session 2)

Source: EAB interviews and analysis.

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Module One: Financial Aid 101 (cont.)	Topic Area	Recommended Month
State, Local, Other Fee Waivers	Process	October (Session 3)
Loans: <ul style="list-style-type: none"> <li>Review institution specific webpage on loans</li> <li>Entrance counseling</li> </ul>	Process	October (Session 3)
Disbursements: <ul style="list-style-type: none"> <li>Understanding award letters</li> <li>Disbursement calendar</li> <li>Calculating your disbursement</li> </ul>	Process	October (Session 3)
Application Periods & Deadlines: <ul style="list-style-type: none"> <li>Appeals</li> <li>FAFSA application deadlines</li> <li>Completing award year files</li> </ul>	Process	October (Session 3)

Module Two: Lab Protocol	Topic Area	Recommended Month
FERPA: <ul style="list-style-type: none"> <li>Department of Education FERPA</li> <li>FERPA release form</li> </ul>	Protocol	October (Session 1)
Lab Protocol: <ul style="list-style-type: none"> <li>Check in/sign in process</li> <li>Allowable use</li> <li>Assisting students do's and don'ts</li> <li>To-do lists</li> </ul>	Protocol	October (Session 1)
Emergency Protocol: <ul style="list-style-type: none"> <li>Rude/disruptive student</li> <li>Violent/aggressive student</li> <li>Active shooter</li> <li>Emergency alerts/evacuations (alarm or announcement)</li> <li>Contacting campus police</li> </ul>	Protocol	October (Session 1)

Source: EAB interviews and analysis.

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Module Three: Satisfactory Academic Progress (SAP)	Topic Area	Recommended Month
<p>Satisfactory Academic Progress:</p> <ul style="list-style-type: none"> <li>• What aid is affected by SAP?</li> <li>• What is SAP applied to?</li> <li>• Minimum standards (GPA, completion rate, maximum time frame)</li> <li>• When is SAP checked?</li> <li>• SAP notices</li> </ul>	SAP	November
<p>Satisfactory Academic Progress Appeals: (Specifically regarding how lab ambassadors should respond to appeals in the lab)</p> <ul style="list-style-type: none"> <li>• When can a student appeal?</li> <li>• Printing degree evaluation reports (if the site is not working)</li> <li>• NSLDS financial aid history (if the site is not working)</li> <li>• Transcripts</li> </ul>	SAP	November