



“100 Series” Advisor Feedback Survey

OVERALL GOALS: The Schools Curriculum Planning Team is developing a catalog of training and resources for financial aid professionals, starting with a “100 Series” as the initial core curriculum. The “100 Series” should provide the foundation knowledge that all new financial aid professionals need to acquire by the end of the first year. Its courses and learning opportunities should be offered throughout the year.

TARGET AUDIENCE: The “100 Series” is for new financial aid professionals. This group includes individuals at newly eligible institutions and at established institutions.

CONTENTS OF THE 100 SERIES: The 100 Series should provide the fundamentals of Title IV administration. Since schools differ in size, type, number of Title IV programs, and number of staff, some courses or materials might not be appropriate for all new financial aid professionals. However, the “100 Series” listing of courses and materials should provide any new financial aid professional with the opportunity to acquire the basic information and resources necessary for an entry-level position at any school.

ISSUES/TOPICS

- Keeping in mind that the “100 Series” is for new Financial Aid Professionals, please rank in order of importance the 6 (or 7) topics you think are most important to provide as a foundation. (A rank of 1 indicates the most important issue.)
- Once you have ranked these in order of importance, please identify which delivery method(s) is most appropriate for each training topics. (Please select delivery methods from the list below.)

DELIVERY METHODS

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| A. Classroom (in-person, group training) | E. Printed information (Handbook, checklists, forms) |
| B. Self-instructional (on-line) | F. Regular sessions at state or regional meetings |
| C. Self-instructional (CD-ROM) | G. Peer Support (coaching) |
| D. Videoconference | H. Other |

Rank 1 - 7	Issue/Topic	Method A - H
	General administrative issues: Roles and responsibilities of the institution, Laws and regulations, Policies and procedures. Other topics in this area include:	
	Student eligibility and processing issues: Understanding FAFSA and ISIR; COA, Verification; Determining awards. Other topics in this area include:	
	General fiscal issues: Cash management; Disbursement; Reconciliation; R2T4; Over-awards and overpayments. Other topics in this area include:	
	Electronic processing issues: Learning to use FSA’s web-based products and software (Portals, IFAP, NSLDS, COD). Other topics in this area include:	
	Reporting issues: How to complete required reports and meet deadlines. Other topics in this area include:	
	Software issues	
	Other Issues/Topics (not covered above) include:	



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RESOURCES/MATERIALS

Please rank the most useful existing courses for new financial aid professionals:

- Fundamentals of Title IV Administration (formerly Precert/New FAA – 4.5 days)*
 Coach (web-based self instruction)
 FISAP on the Web (web-based self instruction)
 Common Origination and Disbursement (web-simulation self instruction)
 Other: _____

What other (new or existing) courses would benefit new financial aid professionals in their first year?

Please rank the most useful existing resources/materials for new financial aid professionals:

- Student Financial Aid Handbook
 New School Guide
 FSA Assessment Tool
 Other: _____

What other (new or existing) resources/materials would benefit new financial aid professionals in their first year?

OTHER FEEDBACK

How much time is the average new financial aid professional provided to attend training outside the school during the first year? Where is this most likely to take place?

How much time is provided for the average new financial aid professional to devote to self-instructional training in the first year?

At the end of the first year, what are the expectations of a new financial aid professional's knowledge?

How are new financial aid professionals' knowledge and skills assessed?

How often should the different types of training be offered? How often should they be updated?

Please provide any other suggestions for the 100 Series for new financial aid professionals: