

Youth Leaders/College Coaches 101

$ Financial Aid $

This process is the most popular task that you will come across as a coach!

Things to know:

* FAFSA opens October 1st each year for the new semester cycle, while students won’t have their updated taxes most times if there wasn’t a change within their financial situation then you can use the previous year’s taxes(1040 form AND IT201), and **update** it once they or their parents have filed.
* When doing FAFSA make sure at the end after you complete the form you DO NOT close the page until you click the **orange** arrow, which will link you to TAP
* Remind students to keep a look out for a verification form; this is a form that they fill out once their FAFSA has been processed. Not everyone gets flagged for verification but MOST do, and they usually are notified to do so via CUNYFIRST
* Using the IRS DATA RETRIEVAL tool on the FAFSA helps verification to be easier, being that the pull information directly from the IRS, the student will not have to bring in the tax information to the school – plus it makes your job easier! (Remember when using this tool you must type the information in **EXACTLY** how it is on the taxes)
* FSA IDs are fairly new, so be prepared to create this for both students AND parents. This is how they will “sign” their FAFSA forms at the end.
* Always remember to press SUBMIT; even if you “sign” FAFSA and exit TAP unless you click submit it will not be processed!



Outreaching

Contacting students and being familiar with your caseload is crucial to successfully obtaining information as well as being able to do your job and assist the students.

* *Forms of outreach include but are not limited to: Calling, texting, Facebook, email, asking through a friend etc.*
* When outreaching it is important to have **goals** before contacting: Obtaining *transcripts, schedules, portal login info/cunyfirst, finding out if they are still enrolled etc.*

Know WHY you are contacting the students!

Have a **checklist** available for the end of the call; this will help you with your follow up call.

If speaking to students is a difficult task for you try having a **script** in front of you while on the call, this will give you **GUIDLINE**, while keeping you focused on achieving your end call goals.

Tips when trying to get student information:

* DO NOT just come out and ask for their portal logins or transcripts, imagine someone you barely know asking for YOUR personal information.
* Introduce yourself, build a conversation, and engage in *small talk.* (How are classes, grades, any classes giving you troubles, what’s your major… etc)
* Once you feel the student has been responsive THEN ask for login info being that it will allow you to help them with any registration or financial aid issues



Teamwork

(Makes the dream work!)

Working in a team is an essential part of being a persistence coach.

Your team is composed of all your allies!

There are many situations that will come up that you may not be familiar with, one thing that is important to remember is if you are unsure what to do to help a student or aren’t 100% on the information you are giving **ASK**, you don’t want to add to a student’s confusion, or cause them future issues in the long run.

Supervisors are there to help at all times and most importantly your other persistent coaches!

Working in a team may not always be smooth sailing, ways to work through that:

* Have open communication
* Don’t address issues in the open, your goal is NOT to embarrass or shame your coworkers – instead pull them to the side and ASK PERMISSION to give some feedback or to speak about something.
* DO NOT USE “You”(you made me feel, you are.. you think…) When talking about an issue use “**I**” statements (I felt, I don’t think)
* Allow growth

