



TEXAS A&M UNIVERSITY

Money Education

Peer Advisor Onboarding Manual

Money Education (ME) Center

Texas A&M University

Welcome!

Overview of Scholarships & Financial Aid:

The Office of Scholarships & Financial Aid is a part of the Division of Enrollment & Academic Services, which reports to the Office of the Provost. It is responsible for scholarships and financial aid processing and advising, student employment, veteran services, and financial education for Texas A&M University. The office is broken down into teams, which have different responsibilities and are run by team managers. This is Team Money, which addresses the financial education portion of Scholarships & Financial Aid, and Nick Kilmer is the team manager. Team Admin oversees the team managers. See the New Employee Manual for Orientation (NEMO) you were given for more details.

Background on the Money Wise Aggie Program:

Since 2005, Texas A&M University has provided financial literacy information to students. The Money Wise Aggie (MWA) program was established in 2007 to help students make smart personal finance decisions while pursuing their academic degrees, in order to lay a foundation for financial success throughout life. It provided workshops, classroom presentations, student group presentations, one-on-one advising, and online resources to Texas A&M students interested in learning about budgeting, credit cards, credit scores, student loans, investing, identity theft, and more. From its inception, one full-time advisor coordinated the program with part-time assistance from other Scholarships & Financial Aid advisors who helped to provide the MWA workshops in the Pavilion each semester. In Fall 2016, the Money Wise Aggie Program was replaced by the new Money Education (ME) Center (see below).

Overview of the Money Education Center:

Scholarships & Financial Aid was approved to develop a financial education center, called the Money Education (ME) Center in 2015. In Fall 2016, the university opened the Money Education (ME) Center within Scholarships & Financial Aid. The ME Center helps students to limit the net cost of attending college, navigate unexpected financial barriers to graduation, minimize student loan debt and default, and prepare for a lifetime of financial decisions. Through presentations, scheduled appointments, walk-in advising, online resources, and our 3 credit hour course (AGEC 235), The ME Center has educated over 23,000 different individuals since opening.

The Money Education website is money.tamu.edu. Visitors can view our presentation schedule, request a presentation, schedule an appointment, ask questions, give feedback, and more. Students, faculty, and staff interested in contacting the ME Center can do so through our website, by emailing money@tamu.edu, by calling 979-845-SAVE (7283), or through social media on Facebook at /aggiemoneyeducation or Twitter @AgsToRiches.

The Peer Advising Program:

Former AGEC 235 students are trained as Peer Advisors to provide presentations, one-on-one advising sessions, delinquent borrower calls, assist with AGEC 235 class management, front desk coverage, and event coordination amongst other duties. Review the "Meet Our Team" section of money.tamu.edu to learn more about each Peer Advisor.

Getting Started

General Information:

The following are a few things which you will need to know as an employee of the office.

- Staff are expected to dress professionally. Jeans are allowed on Friday (unless you are presenting or have an important meeting), but tennis shoes are not allowed.
- The breakroom upstairs has coffee, tea, cocoa, and filtered water. You can store your food in the refrigerator and use the microwaves and toaster oven. The refrigerator is emptied out every Friday. A mini-fridge and coffee maker are also located in the ME Center as well.

Initial Setup:

The following needs to be completed shortly after starting work:

- Meet all of the Assistant Directors, Associate Directors, Directors, and the Assistant Vice President.
- Have your picture emailed to the entire office.
- Have IT setup your computer access. Don't forget the following:
 - Access to the money@tamu.edu email inbox
 - Access to the money@tamu.edu team Outlook Calendar
 - Access to the phone/lobby coverage team Outlook Calendar
 - Access to the Team Money shared folder
 - Be added to the SFAID – TeamMoney email distribution group
 - Be added to the SFAID – OfficeEveryone email distribution group
- Gain access to [SWAN](#) (Student Walk-Ins, Appointments, & Notes).
- Gain access to [ERS](#) (Event Registration System).
- Complete all required online trainings through TrainTraq in sso.tamu.edu.
- Gain access to BANNER and nsls.ed.gov.
- Receive an office polo & t-shirt.
- Set up your office email signature according to the email signature document in this binder.
- Become familiar with the staff and office environment by reviewing the office organizational chart and office map in this binder.
- Read the SWAN Money Education Center Manual included in this binder.
- Read the Money Education Center Presentation & Resource Table Manual in this binder.



Expectations:

- 5 Keys to Being a Successful Employee
 - Be on time (emergencies happen)
 - Don't cause drama:
 - Complete all of your basic job duties
 - Make your boss's life easier
 - Willingly accept and seek out opportunities for development or growth
- Attire
 - In order to create an environment that is viewed as professional and reliable, it is your responsibility to present yourself appropriately. Staff are expected to dress professionally when at work. You will be given a Money Education polo which you should wear at presentations and resource tables.
- Behavior
 - It is expected that the language used when interacting with students, co-workers, and staff within the center is appropriate and professional.
 - Be punctual.
 - Provide advance notice of schedule changes.
 - Notify your supervisor as soon as possible if illness/emergencies come up that prevent working.
 - Strive to grow and develop (take on challenges).
 - Ask for help when you need it. Never give out false information.
 - Keep interactions confidential.
 - Don't judge.
 - Be flexible.
- Front Desk
 - Present yourself in a professional manner.
 - Be eager and prepared to answer any questions that students entering the ME Center may have.
 - Use headphones when viewing videos or other content that has audio.
- Email
 - Respond to emails in the money@tamu.edu email inbox within 1 business day.
 - Forward emails in the money@tamu.edu email inbox to the appropriate person when necessary.
 - Move emails to which you have responded to appropriate sub-folder in the money@tamu.edu inbox.
- Main Phone Line
 - When answering the phone, be kind and inviting.
 - If a caller asks a question for which you do not have an answer, ask them if they can hold or be called back (if they are unable to hold) so you can get the correct answer for them. Don't guess!
- Scheduling
 - Schedule advising appointments upon student request (via email, phone, or walk-in) through SWAN (see the SWAN Manual for details). Students can also do so themselves on our website.
- Presentations
 - A presentation coordinator will assign presentations to the appropriate presenter.
 - All elements of training for a particular topic must be completed before presenting will be allowed.
- Advising
 - Do not give blind advice on a topic you do not thoroughly understand. It is OK to confirm information with one of the other advisors or let the student know that another advisor can answer their question.



Initial Training

Day 1 Agenda:

(45 minutes) Introduction to ME Center & SFAID

- ME Center purpose and services
- Staff directory and organizational structure
- 5 Keys to Being a Successful Employee
- Office and breakroom tour
- Printers, copiers, and scanners

(90 minutes) Outlook (Rearrange if IT is not ready)

- Computer setup
- Email signature setup
- Semester work schedule preparation
- Outlook Calendar event setup (including weekly 30 minute meeting)
- Outlook Email folder setup
- Outlook Email cell phone setup
- money@tamu.edu Outlook Email Inbox

(30 minutes) SWAN

- Proper lobby behavior
- Lobby student sign-in process (SWAN)
- Student appointment scheduling (SWAN)
- Student note taking/tracking (SWAN)

Day 2 Agenda:

(75 minutes) ERS & Money Inbox

- Event (presentation/resource table) creation process and expectations
- Adding events to money@tamu.edu Calendar
- adding/deleting events in ERS
- Inputting student rosters for events in ERS
- The Rule of 25 (registration links)
- Proper email etiquette (pictures with snipping tool and email templates)
- Replying to event requests (email templates)
- Practice event creation process from beginning to end (Class and Student Group)

(10 minutes) O DRIVE

- Accessing the team shared drive
- Computer task bar pinning

(50 minutes) Financial Aid / Moses / Compass

- Financial aid basics (Navigate Website)
- Compass (RRAAREQ, RHACOMM, RPAAWRD, SPAIDEN)
- Financial Aid Portal (clearing student requirements)
- Department Intranet (MOSES)
- National Student Loan Data System

Day 3 Agenda:

(30 minutes) Resource Tables & Who We Are

- Articulating our purpose and services
- Practice elevator speech (ME Center Handout)
- Incorporate Center overview into walk-in advising

(45 minutes) Presentation Preparation Presenting Process

- Recording student attendance (UINs)
- Preparing for a presentation (logistics)
- Practicing a presentation (slide goals, value added, stories)
- Practice, Practice, Practice (book practice room)

(60 minutes) Live Presentation

- Example presentation (money management)
- Handling tough questions

Day 4 Agenda:

(40 minutes) Preparation for Advising

- Student sign-in process
- Sit in on other advisor's appointments
- Review appropriate note taking (SWAN)
- Adding appointment availability (SWAN)

(60 minutes) Advising Process

- Review *Advising Others* Presentation
- Handling tough questions

(15 minutes) SSO (Ask David for help as needed)

- Submitting timesheets (set Outlook reminders)
- Required trainings
- Setup Direct Deposit

(20 minutes) Wrap Up

- Discuss personal goals
- Complete knowledge assessment
- Discuss binder importance
- Questions?



Ongoing Training

Trainings:

Below are the topics which you should focus on initially. After mastering these topics, you will be able to move on to additional topics (Saving & Investing, Love & Money, Credit Cards & Credit Scores, etc.).

	Money Management	Repaying Student Loans	Annual Loan Counseling
Read through the PowerPoint presentation			
Observe the presentation live			
Develop your own version of the presentation			
Book PAV 106AD and Practice Present (Min. x3)			
Take Knowledge Assessment over the Topic			
Mock present the presentation			
Present while being monitored by a Staff Member			
Cleared to Present on this Topic			
Observe 5 appointments			
Advise while being monitored by a Staff Member			
Cleared to Advised on this Topic			

Peer Advisor Presentation Checklist:

1 Week before Presentation

- _____ Review presentation slides for typos and full functionality
- _____ Practice present AT LEAST 2-3 times
- _____ Review details of the presentation (know who you are presenting to)

Day before Presentation

- _____ Find the location of your presentation
- _____ Schedule travel time and find parking options
- _____ Save your presentation in multiple forms (email, flash drive, physical copy)
- _____ Confirm the presentation with a staff member (Student Group Presentations)

Day of Presentation

- _____ Wear ME polo and appropriate presenting attire
- _____ Do you have your presentation with you?
- _____ Do you have the presentation roster and pen?
- _____ Do you have the clicker if you plan on using it?
- _____ Do you have the ME handouts for your presentation topic?
- _____ Do you have ME Center giveaways if you plan on using them?
- _____ Review presentation one last time
- _____ Show up in presentation room 15 minutes before the start of the presentation
- _____ Test your videos and any external content that you are using for the presentation
- _____ Text David 10 minutes before presentation to confirm attendance

After the Presentation

- _____ Bring roster, clicker, and leftover materials back to ME Center

Advising

General Information:

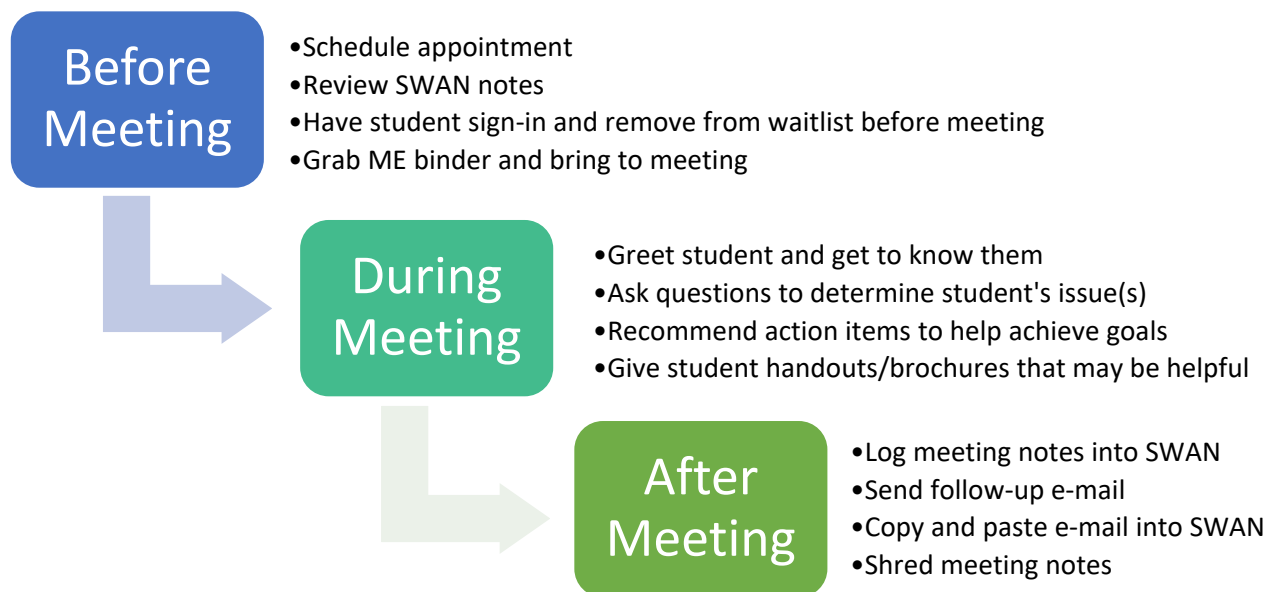
Private advising sessions will almost always be by appointment. Appointments will be scheduled online through SWAN. Students can do so on the Contact Us page of money.tamu.edu or a staff member can do it for them directly through SWAN. See the Money Education SWAN Manual for more information regarding this. Walk-In Advising is available in the lobby Monday thru Friday, 8am-5pm.

Expectations and Recommendations:

Keep in mind your limitations when advising. The worst thing you can do is give advice that is not accurate or advantageous to the specific situation of the student you are advising. If a student asks a question that you do not know the answer to, you should either let the student know that you will do research to find the answer, or refer them to someone else within the center who is more qualified to answer their question.

It is vital that a student coming in to receive advice feels welcome and able to share openly. For this reason, it is important to convey a judgement-free zone. By eagerly listening and analyzing what the student has to say, you enable them to feel that they can share their current financial status openly, and in turn, create the opportunity for relatability between peers. Being able to relate to the students you advise is a major advantage.

Steps for Successful Advising Sessions:





Money Education (ME) Center Peer Advisor
CONFIDENTIALITY AGREEMENT

I hereby agree that I will comply with Texas A&M University's Money Education (ME) Center policies, procedures, and ethical standards regarding customer confidentiality. I will maintain the confidentiality of customers and I will not disclose any personally identifiable customer information. I will respect customer privacy and the confidentiality of the customer/Peer Advisor relationship. Such matters will not be discussed outside of the Money Education (ME) Center Peer Advisor supervisory staff.

By signing this agreement, I agree to fulfill in good faith the confidentiality requirement set forward herein and be strictly guided by this agreement in all my activities related to Money Education (ME) Center Peer Advising.

I understand that any violation may result in removal from the Money Education (ME) Center Peer Advising Program.

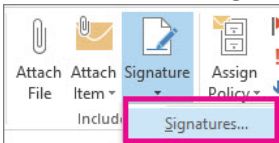
Printed Name: _____

Signature: _____

Date: _____

Add a Signature to Messages:

1. On the **Home** tab, choose **New Email**.
2. On the **Message** tab, in the **Include** group, choose **Signature > Signatures**.
3. Under the **Select signature to edit**, choose **New**, and in the **New Signature** dialog box, type a *name* for the signature.
4. Under **Choose default signature**, do the following:
 - a. In the **E-mail account** list, choose an email account to associate with the signature.
 - b. In the **New messages** list, choose the signature that you want to be added automatically to all new email



messages. If you don't want to auto sign your email messages, accept the default option of **(none)**.

- c. In the **Replies/forwards** list, choose the signature that you want to be added automatically (auto sign) when you reply to or forward messages. Otherwise, accept the default option of **(none)**.
5. Under **Edit signature**, type the *signature*, and then choose **OK**.

Add Social Media Links to Your Signature:

1. In Outlook, on the **Home** tab, choose **New Email**.
2. On the **Message** tab, in the **Include** group, choose **Signature > Signatures**.
3. On the **E-mail Signature** tab, choose **New**.
4. Type a *name* for the signature, and then choose **OK**.
5. In the **Edit signature** box, type the *text* that you want to appear for this new signature and use the mini formatting toolbar to style your entry as you desire.
 - a. **Tip:** Press Enter after typing text for the new signature to make sure the icons you add are aligned on a single line.
6. Choose **Picture**, go to the **Desktop** folder, and then choose the social networking service icon you saved.
7. Choose **Insert > Hyperlink**.
8. In the **Address** box, enter the web address—for example, <http://www.facebook.com/username>—for your Facebook, Twitter, or other social network account that corresponds to the icon, and then choose **OK**.
 - a. **Note:** If you have more than one icon to add, repeat steps 6 through 8 for each icon you want to add.
9. Choose **OK** to finish creating the new signature.
10. Inside the body of the message, on the **Message** tab, in the **Include** group, choose **Signature** and choose your newly created signature.

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