

Learning for Success: An Online Financial Aid Training Module for Student Services Staff at Kauai Community College

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Abstract: A new learning module on financial aid basics has been developed for student services staff, namely academic counselors and other mentors at Kauai Community College. Participants were existing student services staff along with other faculty and staff at the college and were recruited from informational flyers, face-to-face inquiries, and via email. A pretest and posttest was given to the participants along with a post-unit survey to gauge satisfaction. The study was intended to be completely asynchronous and used the learning management system Canvas. Content was designed to be scaffolded and chunked into three modules, while also using multimedia tools to enhance the learning experience. Results of this study showed that the training module increased subjects' knowledge of financial aid basics as shown in the posttest results. Expectations were that this extra knowledge will increase cross-departmental communication and training, efficiency for information dissemination to the student, increase student satisfaction with the college, and increase retention and graduation rates.

Introduction:

Kauai Community College is a 2-year college and a campus within the University of Hawaii system. The college is accredited and provides its students the option for applying for Federal financial aid. Over 50% of KCC's students receive some sort of financial aid, yet the college does not have a mechanism to properly train its Student Services staff on the Financial Aid life cycle students go through. This often leaves students confused about their financial aid eligibility when speaking to their counselors or other Student Services staff outside of the financial aid office. Areas of confusion might range from how their tuition costs will be paid, amounts they can expect to receive, to basic level information such as differences between grants and loans. As a result, students may be hesitant to enroll in sufficient credits when visiting with their counselors in their mandatory meetings. This requires the student to make additional appointments with the Financial Aid staff in order to understand the basic details.

Student satisfaction on the advising aspect of Student Services hinges on, among other things, the successful communication of financial aid. Coll & Draves (2009) state that "...Faculty behaviors such as discussing personal values, majors/academic concentrations, and financial aid account for significant variance in the prediction of student advising satisfaction." (2009, pp.215-223). If counselors, or other Student

Services staff were trained on the Financial Aid basics, they would be able to communicate the relevant theories and ideas to the student while considering enrollment level, varying classes to register for, and other tasks important to student graduation and retention. Absent this training, students are required to meet with Financial Aid staff to learn the basics and details of their eligibility which may or may not affect the outcome of their previous visit with their counselor. Additional visits may be needed to adjust schedules and/or enrollment levels with their academic counselor, resulting in increasing workload for employees as well as frustration amongst students.

Although scholarly research specific to the lack of training for University of Hawaii staff was not found, real world experiences by myself and others at the college would indicate that the lack of training is an issue. During my six-year tenure as Financial Aid Director at Kauai Community College, I've seen time and time again, Student Services staff come on board without a training plan implemented for them to follow. The majority of other institutions, employers, and third-party servicers, all seem to have some kind of training program implemented for their new hires. Whether it be an entire training department, one-on-one training by their supervisor, an online self-paced training program, or even a simple outline on a Word document. Having such plans implemented allow the learner to settle into their new role and immediately start learning the relevant content without the anxiety caused by the "not knowing what you don't know" syndrome. An effective training program drastically reduces the learning curve of complex topics, thus increasing effectiveness, efficiency, and in the cases of learning institutions, can increase student enrollment and retention.

This research project was charged with resolving this issue through the creation of an online self-paced Financial Aid basics training module for Student Services staff at Kauai Community College. During the 2017-18 award year, 47% of eligible KCC students received some amount of Pell grant award, resulting in \$1.5M disbursed. (Anderson, J., 2018). Because the Pell grant is the most awarded Federal grant and applies to the broadest group of students, the training module focused on Financial Aid basics and how it relates to the Pell grant.

The purpose of this instructional design project was to develop and evaluate the effectiveness of an online Financial Aid employee training module for Student Services staff members at Kauai Community College. To date, no cross-departmental training for Student Services has been implemented at Kauai Community College. Once an online training module were to be implemented, not only will counselors and Financial Aid staff benefit by increased efficiency, but students will also benefit by having streamlined processes in place and one distinct message regarding Financial Aid being communicated from every source.

Literature Review

At Kauai Community College, no official standardized training program exists for new employees or for cross-departmental training. New employees are periodically given

“bits” of information relevant to the task at hand, leaving them to piece together all that information and form the bigger picture that makes up the process. And inter-departmental communication is nullified, causing the student to make the extra effort to go back and forth between departments and piece together the information.

Information sharing and other types of cross-departmental collaboration and cross-training results in multiple benefits such as easing of bureaucratic hurdles that often serve as barriers to student success, and also reflects the level of commitment to all students. (Voss-Ward, C. 2018). Implementing a training program to increase cross-departmental knowledge would benefit not only the student by streamlining the information flow to them and reaffirming the information when the same message is sent from a different source, but also benefit the college by streamlining processes, reducing workflows, reducing wait times, and increasing student satisfaction as reflected in surveys. Professional development levels for the staff members would also increase and employee retention, employee satisfaction, and morale would all increase as well. As Channing and Huggins put it, “...a key factor in increasing student success is cross-departmental collaboration and communication.” (Channing, J., Huggins, J. 2016, pp. 25-27)

Development and implementation of an instructional design project that aims to bridge the cross-departmental gap would aid in resolving some of the resulting issues mentioned above. In order to adapt to the varying Student Services staff schedules, the instructional design project would consist of asynchronous learning modules allowing the learner to complete them at their own pace. In addition, the modules would be online, accessed through a login and password, allowing for convenience by accessing the modules remotely via phone, tablet, laptop, app, or computer. “Advantages of a web-based training approach allows for increased flexibility, accessibility, cost-efficiency, scalability, potential for both didactic and interactive learning, consistency in quality, and importantly, the potential for remote supervision/consultation.” (Khanna, M., Kendall, P., 2015, pp.291-301).

This study focuses on the user’s cognitive learning domain, and as such utilizes relevant learning techniques and methods in order to maximize the effectiveness of the content. The learning management system Canvas allows exploration of a multitude of tools that enhance the user’s experience and is in line with the cognitive learning theory by assuring the user’s limits on working memory load are not exceeded while learning the material. For example, the learning unit provides lessons on topics by including both explanations in words and in pictures/videos such as YouTube videos, graphics created on Canva, and/or a virtual learning presentation created on Prezi. By enacting this “Multiple Representation Principle” the user’s experience, and level of cognitive learning are enhanced. Studies have shown that it is more effective to provide training in both pictures and narrative format than solely in words. (Kirschner, P., 2002).

Aesthetics, layout, and color schemes included in the modules are also important to note. Applying aesthetic standards and visual content during online course development can improve not only the appearance, but also the level of interaction and reaction student have with those courses. (David, A., Glore, P. 2010 pp.1). Careful attention has been applied to background colors and avoiding bright backgrounds and/or clashing colors. Font sizes and styles and overall layouts and dissemination of the information are also of importance. “An appropriate color scheme conveys professionalism and will help learners to engage with the material” (Reyna, J., 2013 pp.28-31)

Methodology

The target audience for this instructional design project was new and existing Student Services staff, with an emphasis on academic counselors, at Kauai Community College. The purpose of this project specifically being aimed at counselors was so that they can convey the learned material to students who are receiving Financial Aid during their mandatory meetings. The online Learning Management System (LMS) Canvas was being utilized in a manner that exhibited proper instructional design theories by chunking the material in digestible amounts and scaffolding the modules appropriately. Overall topics of learning were focused on the Financial Aid basics only and limited to the Pell grant.

Canvas was chosen for this project due to its organizational capabilities and effectively allowing for chunking the material into modules, and allowing for scaffolding of the learning material, thus leading to a superior learning experience. Canvas has a proven track record for accomplishing these tasks as outlined below in Rizzuto’s 2017 study:

Detailed instructional objectives for the online self-paced course were developed and utilized to guide the systematic planning of instructional strategies. The content for Rubrics 101 was divided, or chunked, into separate modules to create the structure and pacing for the course. Modules were developed within the LMS using prerequisites so faculty could advance through the course at their own pace as each module unlocked. A course completion checklist presented faculty with a high-level overview of the new knowledge and skills that they could attain by completing the course. (Rizzuto, M. 2017, p. 79)

Two main research questions were developed for the purposes of this study. They are as follows:

Research Questions

- How effective was the training module in increasing subjects’ knowledge of Financial Aid?
- How comfortable are Student Services staff with discussing Financial Aid topics with their students after completing the training module?

Content Analysis

Academic counselors at Kauai CC are not Financial Aid professionals, and as such do not need to be familiar with the vast amount of details associated with the Financial Aid life cycle students go through. However, it would be useful if they were familiar with the overall concepts of the basic processes. This project aims to provide that knowledge. As mentioned previously, the material will be covered via Canvas utilizing 3 modules on the Pell Grant.

Table 1: Learning Unit Outline

Module 1	Student Eligibility	<ul style="list-style-type: none"> • FAFSA and the resulting EFC • Outstanding Requirements (Verification, C-Codes) • Lifetime Limitations
Module 2	Pell Grant Awarding	<ul style="list-style-type: none"> • EFC and Award Amount • Enrollment Level and Award Amount
Module 3	Drops and Withdrawals	<ul style="list-style-type: none"> • Pell Recalculation Dates • Tuition Refunds and Pell Adjustments • Return to Title IV Calculations (R2T4)

The information presented was “chunked” into the 3 modules by determining the aspects of the financial aid student life cycle most relevant to conversations had between student and academic counselor. Furthermore, these are basic concepts that staff who aren’t Financial Aid professionals, yet who are academically savvy, will understand and be able to convey to their students. Also, these are topics that can be summarized timely to fit into their discussion timeframe nicely. “You don’t need to be an expert in financial aid to advocate for your students” (Handel, S. 2008)

Learning Objectives

After completion of the modules, and as reflected in their responses to the post-test questions, the learners shall be able to

- Compare and contrast the various aspects of student eligibility in relation to the Pell grant
- Convey how enrollment level and EFC affect the awarding of the Pell grant
- Discuss how dropped classes and withdrawals affect the student Pell grant award

Participants

As previously mentioned, the main participant group consists of Student Services faculty and staff at Kauai Community College with a focus on the academic counselors. The participants of the study consisted of a selection of counselors, some existing Financial Aid staff, select faculty members and/or critical friends. A group of 15 individuals were selected and 11 agreed to volunteer to participate in the course.

Participants were given a pre-test, completed the modules, then were given a post-test to assess the level of learning acquired. Upon completion of the post-test, participants were asked to take a survey to gauge the level of satisfaction with the project. Most participants had little to no knowledge of the Pell grant information given prior to the study. Some financial aid staff were included in order to gauge the accuracy of the information given and to identify any corrections needed.

Recruitment of participants were done via email advertisements, face-to-face inquiries, and/or by flyers posted around the campus (Appendix A). No incentives were given, and no participants were under the age of 18.

The aim of this instructional unit was to be used by Student Services staff who regularly communicate with students. Student Services staff, in their daily roles at the college, tend to have to use their cognitive as well as affective realms when dealing with their office responsibilities and advising students respectively. As a result, the instructional unit was developed with content mainly attributable to the cognitive domain because of the type of content being learned, however some affective domain aspects were built in.

Evaluation Instruments.

Certain evaluation instruments were utilized for this research project in order to gain data on the effectiveness of the training module. Evaluation instruments include pre-tests, post-tests, and a survey. All of the questions within the pre-tests, post-tests were aligned with the research questions and the learning outcomes. Pre-test questions were developed with the intention of gauging the level of knowledge participants have prior to participating in the learning module. Post-tests gauged the participants' level of knowledge on the topic after completing the learning module and can measure the effectiveness of the learning modules. The pre-test and post-test each had 15 questions that cover information from each of the 3 modules contained within the instructional unit. The pre/post-tests contain a mixture of multiple choice, true false, and short answer type questions. The multiple-choice questions contain fairly challenging with possible, yet clearly incorrect false answers. The pre and post test questions were parallel.

Below is an outline of the information contained in each module. See also Appendix B and C respectively for pre-test and post-test questions and their associated modules. After comparing, you can determine that the pre and post test questions are aligned directly with information from associated modules.

Module 1 contains information on the following topics:

- FAFSA and Resulting EFC
- Outstanding Requirements - Additional Information Required
 - Verification
 - C-Codes
- Lifetime Limitations

Module 2 contains information on the following topics:

- EFC determined by information listed on the FAFSA
 - Formula created by Dept. of Ed
 - EFC constant amongst all schools
- Enrollment Level
 - Full time :12 credits or more
 - ¾ Time: 9-11 credits
 - Halftime: 6-8 credits
 - Less than halftime: 1-5 credits

Module 3 contains information on the following topics:

- Disbursements: Half the award disbursed in Fall, half in Spring semesters
 - Staggered disbursements for Module classes
 - Pays tuition/fees only - Refunds. Typically, doesn't pay books
- Drops
 - Role of census dates (Pell Recalculation dates)
 - Tuition refunds and Pell Adjustments
- Withdrawals
 - Official vs. Unofficial
 - Return to Title IV

A post unit survey (Appendix D) also was provided in order to gauge participant satisfaction and provide the opportunity for participants to give feedback on the instructional unit. Any feedback given was used for improvements. Questions on the survey were formulated directly from the learning objectives and the research questions. The survey was taken electronically through Google survey software. Survey questions utilized a 5-pt. Likert scale.

Project Design

Canvas was chosen for this project due to its organizational capabilities and effectively allowing for chunking the material into modules, and allowing for scaffolding of the learning material, thus leading to a superior learning experience. Canvas also was the repository that held the learning content along with the various tools that was used for the transfer of learning. Some tools included Canva brochures (Figure 1), YouTube videos (Figure 2), and Google forms for survey dissemination. Links for all tools were made available in the appendices section, and some examples are listed in the figures below.

A PREPARATORY TIMELINE

PAYING FOR COLLEGE

 **Apply for the FAFSA** (*Free Application for Federal Student Aid*)
OCTOBER

Oct. 1 of each year the FAFSA opens to apply for Federal Financial Aid for the following school year starting in the Fall. Tax information will be needed. And some students will need their parents info too.

 **Research Scholarships**
DECEMBER

Utilize scholarship searches and apply to as many as possible because each year money goes unspent. Don't lose out. Every application, every dollar counts

 **Apply for College**
JANUARY

The sooner you apply and get accepted, the better. Most schools have institutional scholarships, so apply soon to make sure you are considered for some of this free money

 **Review Your Award Letters**
MARCH

If the school received your FAFSA application, they'll send you an award letter. This outlines what the school is offering you to attend. Review and choose which school's award package works best for you

 **Be in Contact**
MAY

Once you've decided on the college for you, make sure to make yourself known. Create your email account. Reach out to the Financial Aid office, they might need further documents from you. Make sure you understand your tuition payment situation.

CONGRATULATIONS! TIME FOR COLLEGE.

Figure 1 - Canva Example



Figure 2: Youtube Video - <https://youtu.be/Pn4OECMTh5w>

Procedures

In conducting this study, procedures were required for the participants to ensure consistency and accuracy of data collected. The study mainly was an asynchronous study on the participants part, with deadlines applied, and no “on site” location was required. Data gathered was from the pre/post tests and surveys, and measured the effectiveness of the learning module in transfer of learning content. No personally identifiable information (PII) was requested and the participant survey was anonymous. Step by step procedures are as follows:

Table 2: Recruitment Through Completion

Event	Description
Recruitment	Send out recruitment materials and gather participants
Pre-Test	Email participants introductory information along with a link to the pre-test questions
Data Gathering	Analysis of the pre-test answers
Instructional Unit Completion	Email participants an invitation to join Canvas and begin the instructional unit. Participants will be allowed to complete unit asynchronously and be given a deadline

Post-Test	As part of the learning unit, the post test will be included. Immediately after completing the learning sections of the unit, the participants will be given the post-test questions
Data Gathering	Analysis of the post-test answers
Post Unit Survey	Email participants the post unit survey
Data Gathering	Analysis of the survey responses

Timeline

The implementation plan for this project spanned over the Fall 2019 through Spring 2020. Much of the creation of the content and initial implementations was done over the Fall semester, while the data gathering, and revisions was completed over the Spring. Producing an exact timeline was challenging due to IRB considerations however an estimated timeline is given below (Table 3)

Table 3: Timeline

Date	Task
October	<ul style="list-style-type: none"> • Initial stages of project plan creation • Create/submit project proposal drafts
November	<ul style="list-style-type: none"> • Begin the IRB approval process • Finalize project proposal draft • Create recruitment tools • Begin drafting module unit online
December	<ul style="list-style-type: none"> • Finalize and present project for approval\ • Start recruiting for participants
January	<ul style="list-style-type: none"> • Project implementation begins upon IRB approval • Disseminate and gather pre-test data
February	<ul style="list-style-type: none"> • Continue implementing project with participants • Providing follow up assistance with participants if needed
March	<ul style="list-style-type: none"> • Disseminate and gather post-test data • Conduct post unit survey • Gather survey data
April	<ul style="list-style-type: none"> • Create TCC Presentation slides • Conduct TCC Presentation
May	<ul style="list-style-type: none"> • Submit Final Paper

Analysis & Results

An email invitation went out to 20 Student Services staff members along with .pdf attachment inviting them to participate in the study. Eleven staff members accepted the

invitation and were sent an invite to join the modules on the Canvas platform. Each member completed the modules, along with the required pre and post tests. 7 staff members participated in the post unit survey and answered the survey questions. Among those 7 who took the survey, 3 added additional comments in the free form text box. Table 3 outlines further demographic information about the participants.

Table 4: Participant Enrollment Demographics

Characteristics	Number	Percent
<i>Job Classification</i>		
Counselor	4	36%
Staff	4	36%
Faculty	1	9%
Student	2	18%
<i>Gender</i>		
Female	8	73%
Male	3	27%
<i>Years of Service</i>		
0-5	7	64%
5-10	3	27%
10+	1	9%

Quantitative Data

Pre and post tests were given to the participants in order to gauge effectiveness of the modules. Both tests had 15 questions, consisting of multiple choice, true/false, as well as short answer. The questions from both the pre and post test were aligned and touching on the same topics, however were worded differently. 9 of the participants showed in improved test scores from the pre test to the post test resulting in an 82% success rate. The average percentage of increase from the pre test to the post test among the 11 participants was a 15.43% increase in score from the pre test to the post test. The maximum increase was 57.14% and the minimum increase was a -42.86%. (Figure C)

Pre-Test, Post-Test and % increase

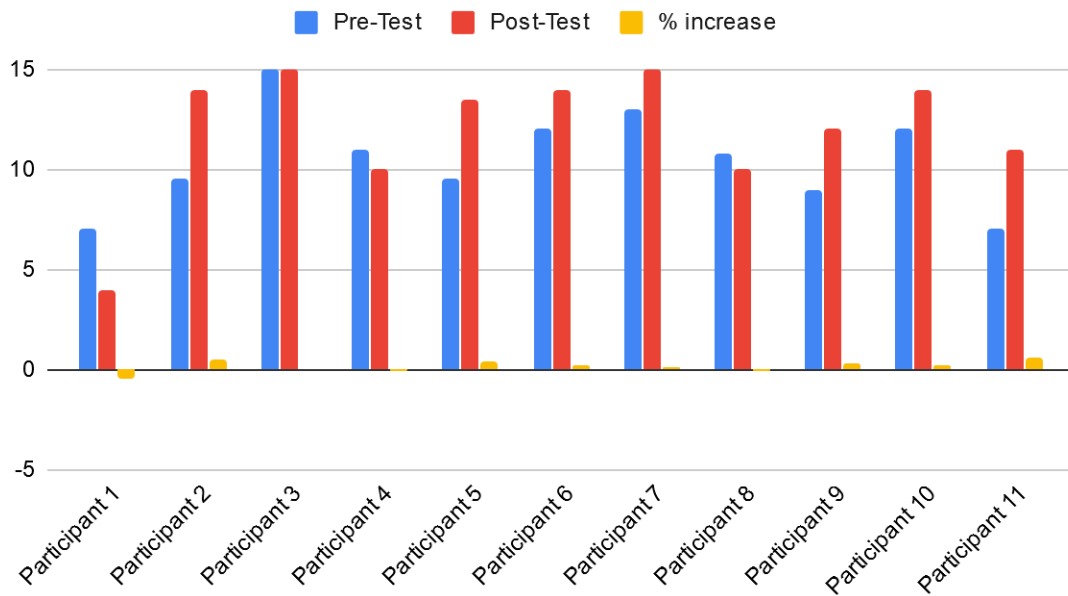


Figure 3 – Test Results

In addition to the pre test and post test information, the survey also provided some quantitative data. The survey consisted of 5 questions, each with a 5pt Likert scale with a 1 score meaning strongly disagree, and a 5 score meaning strongly agree. 7 out of 11 (64%) of the unit participants took the optional post unit survey, with 97% of those participants rating each question either a 4 (agree) or a 5 (strongly agree). (Figure D)

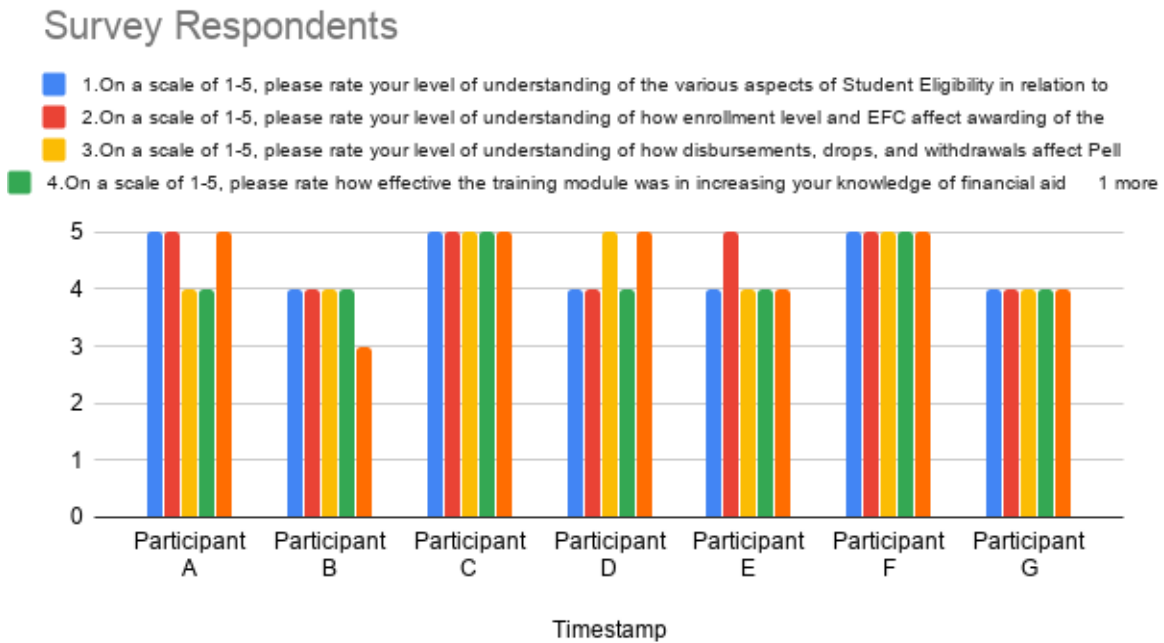


Figure 4 – Survey Respondents

Qualitative Data

The post unit survey also provided valuable quantitative data. Specifically from the final question on the survey where participants were asked to provide any additional information that might help to improve the study. It was discovered that some participants learned a lot of information on specific topics within the modules such as Pell recalculation dates and the resulting consequences that might affect students. It was also discovered where some confusion lies with some students within the modules. Specific pre/post test questions were found to be worded unclear. Also, it was suggested that more clarity could be brought to the question(s) and/or make them all multiple choice. Also, it was pointed out that the module failed to spell out titles the first time mentioning them and instead used acronyms. In order to visualize what some of the comments were from the survey, a word cloud was utilized which incorporates some of the main words used from the text provided. See Figure E



Figure 5 – Word Cloud

Discussion

Although the intent behind this project is solely to benefit the student by increasing cross-departmental training, I anticipate slight resistance at the forefront with other Student Services staff. This is because, initially, the training requires additional workload on the part of the staff that is to be trained. Additional time will need to be allocated from those with already high workloads, along with effort and the willingness to learn new material for this project to see its full potential. With that said, I feel that, once committed the participants will find the content engaging and fruitful. Participants might be eager to share their newly learned information with their students, which in turn will justify the need for the study. Furthermore, once engaged, the staff will surely communicate their newly found Financial Aid knowledge with their peers that have not yet participated. Hopefully this will spark a motivation for new staff to participate in future cohorts. Further motivation for faculty and staff might be attained by offering a certificate of completion after finishing the learning unit. By enticing this certificate, and the potential of including it on their resume, it might allow for increased participation. This learning unit being available for multiple cohorts, and multiple years will ensure an improved

reputation solidly rooted in the foundation of Student Services at Kauai Community College.

Students stand to greatly benefit from implementation as well. Their mandatory meetings with their counselors will be extremely streamlined with the knowledge of basic Financial Aid concepts that their counselors have attained. The process of decisions making in regards to schedules of enrollment, enrollment levels each semester, individual classes enrolled, and overall majors all will be streamlined to ensure eligibility of Financial Aid. It will alleviate the need to adjust schedules later, once it is discovered their eligibility for Financial Aid is not maximized. The simple fact that students will be getting similar information about Financial Aid from outside the Financial Aid office only will reinforce that information as being true and valid. It will negate the need for the students to make frivolous appointments with the Financial Aid office solely for clarification. And in turn will increase the legitimacy of the Student Services staff, campus wide faculty and staff, and the overall campus reputation as reflected from the various student surveys.

Conclusion

All too often, staff at Kauai Community College work in silos with no knowledge of what the other department's processes are. As a result, cross departmental communication tends to be minimized which leads to inefficiencies and overall low satisfaction levels from the end users which are our students. This project aimed to partly remedy that issue by developing an online Financial Aid training module to teach Kauai Community College academic counselors the basics on the Federal Pell grant. Benefits from the project, aside from general professional development for the participants, are that the counselors can relay the learned information to their students during their mandatory counseling sessions and apply the concepts when creating the student's schedules for subsequent semesters.

Administration at Kauai Community College might want to consider allowing implementation of this learning unit for a couple reasons. First reason being that this could act as an introduction of a formalized training process for incoming faculty/staff to the college. Currently there is no formalized training at all for new hires, and as a result the learning curve is a lot longer than needed. By implementing this training tool, the results could reveal how effective a formalized training tool can be by showing the increase in efficiency of time and money spent. Secondly, FAFSA completion numbers, Pell disbursement rates, and account receivables for the college all stand to improve. By promoting this information to students, it will help identify non-FAFSA filers and nudge them to complete the application by showing the benefits of doing so. As a result, the number of Pell recipients will increase as will income for the college. Student financial obligations will decrease and retention will increase. All this results in student success rates and graduation rates improving.

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APPENDICES

Appendix A



PARTICIPANTS WANTED

BASIC FINANCIAL AID TRAINING

FINANCIAL AID OFFICE

Be a part of a study of cross-departmental training of basic financial aid topics in order to better inform Student Services staff on financial aid topics. Students will be better informed of their financial aid situations as a result. Work alone or as a group, on your own time.

EMAIL JEFFA@HAWAII.EDU IF INTERESTED OR WITH QUESTIONS

Appendix B

Pre-Test Questions:

1. After submitting the FAFSA, student information is submitted to multiple government agency databases for confirmation. Which is not a government agency database student information is submitted to: *Module 1*
 - a. DHS
 - b. Selective Service
 - c. NSLDS
 - d. DLNR
2. What causes a C-Flag on the student's ISIR/Student Aid Report (SAR) *Module 1*
 - a. Student/Parent not signing the FAFSA
 - b. When the student/parent didn't file taxes
 - c. When additional information is needed as a result from the government database matches
 - d. Applicant having a Bachelor's degree
3. What does the EFC stand for? *Module 1*
4. In order to be eligible for a Pell Grant, a student must not have: *Module 1*
 - a. Children
 - b. A Spouse
 - c. A Bachelor's Degree
 - d. Previously received a Pell Grant
5. Explain how the EFC affects the Pell grant amount. *Module 1*
6. A person's lifetime limitation for the Pell grant award is: *Module 1*
 - a. 600%
 - b. 700%
 - c. 500%
 - d. 400%
7. A student's EFC at one institution may be different from another institution. *Module 2*
 - a. True
 - b. False
8. How is a student's Pell grant award affected if the student increases their credit load for the semester from 9 to 11 credits? *Module 2*
 - a. Award is Increased
 - b. Award is Decreased
 - c. No change
9. Please explain the range of credits that make up the following categories: Less than halftime, halftime, three quarter time, full time. *Module 2*
10. The Estimated Family Contribution (EFC) is calculated by: *Module 2*
 - a. The institution
 - b. National Student Loan Database System (NSLDS)
 - c. Dept. of Homeland Security (DHS)
 - d. Dept. of Education
11. If a student knows they will only be attending Fall semester, they can choose to receive their entire annual award in the Fall. *Module 3*
 - a. True
 - b. False
12. Upon disbursement, the Pell Grant automatically pays: *Module 3*
 - a. Tuition and Fees
 - b. Books and Supplies
 - c. Room and Board
 - d. Past due balances
13. If a student drops a class prior to the Pell recalculation date, which of the following occurs: *Module 3*
 - a. Tuition refund
 - b. Pell adjustment
 - c. A and B
 - d. None of the above
14. Please explain the difference between "Official" and "Unofficial" withdrawals. *Module 3*
15. When does a Return to Title IV calculation (R2T4) occur? *Module 3*
 - a. When a student receives tuition refund
 - b. When a student completely withdraws
 - c. When a student transfers
 - d. When a student increases enrollment

Appendix C

Post-Test Questions:

1. After submitting the FAFSA, student information is submitted to multiple government agency databases for confirmation. Which is a government agency database student information is submitted to: *Module 1*
 - a. DHS
 - b. DHHL
 - c. Dept. of Ed
 - d. DLNR
2. What causes a C-Flag on the student's ISIR/Student Aid Report (SAR) *Module 1*
 - a. When the student/parent didn't file taxes
 - b. Student/Parent not signing the FAFSA
 - c. Applicant having a bachelors degree
 - d. When additional information is needed as a result from the government database matches
 - e.
3. What does the EFC stand for? *Module 1*
4. Compare and contrast the various aspects of student eligibility in relation to the Pell grant.
5. Explain how Pell grant amounts are affected by differing enrollment levels and the EFC. *Module 1*
6. A person's lifetime limitation for the Pell grant award is: *Module 1*
 - a. 200%
 - b. 400%
 - c. 600%
 - d. 800%
7. A student's EFC remains constant among all institutions. *Module 2*
 - a. True
 - b. False
8. How is a student's Pell grant award affected if the student increases their credit load for the semester from 9 to 12 credits? *Module 2*
 - a. Award is Increased
 - b. Award is Decreased
 - c. No change
9. What is the range of credits for three quarter time? *Module 2*
10. The Estimated Family Contribution (EFC) is calculated by the institution: *Module 2*
 - a. True
 - b. False
11. If a student knows they will only be attending Fall semester, they can choose to receive their entire Pell annual award in the Fall. *Module 3*
 - a. True
 - b. False
12. Upon disbursement, the Pell Grant automatically pays which of the following: *Module 3*
 - a. Tuition and Fees
 - b. Books and Supplies
 - c. Room and Board
 - d. Past due balances
13. If a student drops a class after the Pell recalculation date, which of the following occurs: *Module 3*
 - a. Tuition refund
 - b. Pell adjustment
 - c. A and B
 - d. None of the above
14. Please explain the difference between "Official" and "Unofficial" withdrawals. *Module 3*
15. When does a Return to Title IV calculation (R2T4) occur? *Module 3*
 - a. When a student transfers
 - b. When a student increases enrollment
 - c. When a student receives a tuition refund
 - d. When a student completely withdraws

Appendix D: <https://forms.gle/8oipXF4Y42LTfqm8A>

Online Financial Aid Training Module Feedback Survey

<https://docs.google.com/forms/d/1cPH62QdTe3PeyZhbZJ3y9r9TFAifG...>

Online Financial Aid Training Module Feedback Survey

Aloha! Congratulations on completing the Online Financial Aid Training Module. Please complete the below survey to assist us in determining the level of effectiveness the unit had in your learning process. Mahalo.

* Required

1. On a scale of 1-5, please rate your level of understanding of the various aspects of Student Eligibility in relation to Pell grant *

Mark only one oval.

1 2 3 4 5

No Understanding Complete Understanding

2. On a scale of 1-5, please rate your level of understanding of how enrollment level and EFC affect awarding of the Pell Grant *

Mark only one oval.

1 2 3 4 5

No Understanding Complete Understanding

3. On a scale of 1-5, please rate your level of understanding of how disbursements, drops, and withdrawals affect Pell grant awards *

Mark only one oval.

1 2 3 4 5

No Understanding Complete Understanding

4. On a scale of 1-5, please rate how effective the training module was in increasing your knowledge of financial aid *

Mark only one oval.

1 2 3 4 5

Not Effective Completely Effective

5. On a scale of 1-5, please rate how comfortable you are with discussing financial aid topics with your students after completing the training module *

Mark only one oval.

1 2 3 4 5

Not at all Comfortable Completely Comfortable

6. Please provide any suggestions for improvement you may have

Appendix E: Consent Form



University of Hawai'i
Consent to Participate in a Research Project

Dr. Curtis Ho, Principal Investigator
 Jeff Anderson, Student Investigator

Project title: Learning for Success: An Online Financial Aid Training Module for Student Services Staff at Kauai Community College

Aloha! My name is Jeff Anderson and you are invited to take part in a research study. I am a graduate student at the University of Hawai'i at Mānoa in the Department of Education. As part of the requirements for earning my graduate degree, I am doing a research project.

What am I being asked to do?

If you participate in this project, you will be asked to complete an online training module that includes a pre and posttest, as well as fill out a survey.

Taking part in this study is your choice.

Your participation in this project is completely voluntary. You may stop participating at any time. If you stop being in the study, there will be no penalty or loss to you. Your choice to participate or not participate will not affect your rights to services provided by University of Hawaii

Why is this study being done?

The purpose of this instructional design project is to develop and evaluate the effectiveness of an online Financial Aid employee training module for Student Services staff members at Kauai Community College. I am asking you to participate because you are a member of Kauai Community College Student Services staff.

What will happen if I decide to take part in this study?

The module will consist of 15 multiple choice and open-ended questions pre-test questions. It will take approximately 5-10 minutes. Subsequently, the training will take you through various modules with learning content. Afterward, you will be asked to complete a Post-test to gauge the level of learning. There will also be a post unit survey you will be asked to complete. The survey questions will include questions that rate you level of understanding and satisfaction. The survey is accessed on a website to which I will provide you a link and should take about 5-10 minutes.

What are the risks and benefits of taking part in this study?

I believe there is little risk to you for participating in this research project. You may become stressed or uncomfortable answering any of the survey questions. If you do become stressed or uncomfortable, you can skip the question or take a break. You can also stop taking the survey or you can withdraw from the project altogether.

There will be no direct benefit to you for participating in this survey. The results of this project may help improve the Student Services department and Counseling program to benefit future students.

Confidentiality and Privacy:

I will not ask you for any personal information, such as your name or address. Please do not include any personal information in your survey responses. Your UH username may be asked of you. I will keep all study in a secure online location and only my University of Hawai'i advisor and I will have access to the information. Other agencies that have legal permission have the



**University of Hawai'i
Consent to Participate in a Research Project**

Dr. Curtis Ho, Principal Investigator
Jeff Anderson, Student Investigator

Project title: Learning for Success: An Online Financial Aid Training Module for Student Services Staff at Kauai Community College

right to review research records. The University of Hawai'i Human Studies Program has the right to review research records for this study.

Compensation:

There will be no monetary compensation for participating in this study

Future Research Studies:

Even after removing identifiers, the data from this study will not be used or distributed for future research studies.

Questions: If you have any questions about this study, please call or email me at 808-245-8384 and Jeffa@hawaii.edu. You may also contact my faculty advisor, Dr. Curtis Ho, at Curtis@hawaii.edu. You may contact the UH Human Studies Program at 808.956.5007 or uhib@hawaii.edu to discuss problems, concerns and questions, obtain information, or offer input with an informed individual who is unaffiliated with the specific research protocol. Please visit <http://go.hawaii.edu/jRd> for more information on your rights as a research participant.

To Access the Survey: Please go to the following web page: (<https://forms.gle/eopDFAHpePnUhLJK8>). You should find a link and instructions for completing the survey. Going to the first page of the survey implies your consent to participate in this study.

Please print or save a copy of this page for your reference.

Print name: _____ Date: _____

Signature: _____

Mahalo!