





Backstage Pass:
Tools and Tricks to Keep Your Office
Running Smoothly
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IASFAA Spring 2026

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Our work these days

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Our work these days





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Working in Financial Aid

- New regulations and rules come faster than ever
- Staff turnover happens more quickly than it used to
- Students expect fast (or immediate answers)
- Technology and systems changes happen more frequently




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What can we do?

- Utilize tools
- Document recurring processes
- Delegate
- Improve our individual productivity




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Utilize Tools – One Note

- Electronic “notebook”
- Allows for tabs with varying information
- Can be accessible online
- Can embed links to other pages, documents, etc
- Searchable




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One Note Usage

- How to guides
- FAQs for staff
- Administrative information
- Onboarding checklists




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One Note

[Advising Manual](#)


[OSFA Office Manual](#)



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One Note Tips


- Just start
- Have a process for archiving
- Review all content on a recurring basis
- Look at both desktop and online versions



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Utilize Tools - Planner


- Tool within teams for "to do" items
- Allows you to set up to do items with deadlines, categories
- Can assign to do items to different staff
- Sends email reminders for items



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Planner Usage

- Office operational calendar
- Personal or team to do lists



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Planner


- [Planner - OSFA Calendar](#)
- [Planner - To Do](#)



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NASFAA P&P Builder

- Tool from NASFAA to help build your policy and procedure manual
- Our office utilized Blue Icon and a retired staff member to build out our initial P&P
- Outlines various sections to fill in, includes regs
- Can assign sections to staff




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NASFAA P&P Builder Usage

- Broad policy and procedure
- Not a "how to" job guide




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NASFAA P&P Builder

- <https://compliance.nasfaa.org/PP>




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Partner and share


- What is a tool that you have used in your work that has helped you or your office become more efficient?



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Delegating


- Once a process is documented, delegate it if possible
- If something never leaves your to do list, consider delegating it
- As knowledge spreads to others, there are more people to rely on



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Partner and share

- What is a situation in which you had success delegating in the past?



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Your own Productivity

- Take time to organize and “brain dump”
- Look for little things that slow you down
 - Outlook pop ups
 - Noise distractions
 - Your own phone – Focus Friend
- Inbox and email management
- Do it now vs do it later – 2 min rule

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Partner and share

- What is something you have found to be helpful in the past for your own personal productivity?

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Individual Reflection

- What is one goal that you have for yourself that would make your life a bit easier when you get back to the office?

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Questions?



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