



STUDENT FINANCIALS ONBOARDING TRAINING MANUAL

ONBOARDING FOR FINANCIAL AID CTCLINK TRAINING

Introduction/Purpose

The purpose of this onboarding manual is to assist new college staff in your training journey through ctcLink (PeopleSoft). Although learning a new software system can be challenging, the hope is that these documents will provide you with information to locate, understand and participate in the various training and learning opportunities available from Washington State Board for Community and Technical Colleges (SBCTC).

How to Use the Onboarding Training Manual

The Onboarding Training Manual is broken down into six sections. Read through each section and open each document to navigate through the manual.

☐ [Onboarding Checklist](#)

Use the Onboarding Checklist to understand the areas within each section that you must complete and to identify which ctcLink self-paced courses you are required to take. All available course offerings are listed on the Course Checklist, but depending on the role(s) you play and functions you perform, you may be required to complete different/more ctcLink courses than your colleagues. Refer to the [Role-Based Student Financials Training Content and Requirements](#) document to help you identify the training opportunities that may benefit your understanding of ctcLink.

☐ [Welcome to ctcLink Training](#)

There are many options for self-education and training resources available that introduce you to new processes and tasks in ctcLink PeopleSoft. It is recommended that employees review all sections to learn where resources are located (links) and what information is covered within each section.

☐ [ctcLink and Student Financial's Place in It](#)

Understand what Student Financials (SF) is, and where it fits into the **ctcLink** (PeopleSoft) system as a whole. The various modules that work within the Student Financials pillar are identified and explained.

☐ [Prerequisite ctcLink Courses](#)

Understand which prerequisite courses to take. Every college staff member is required to successfully complete - with an 80% or higher final grade - the PeopleSoft Fundamentals, HCM Employee Self-Service and CS Student Self-Service courses to prepare for topic specific content through role based courses and ILT learning opportunities.

☐ [Role-Based Student Financials Training Content and Requirements](#)

Each module of Student Financials has an aligned ctcLink Canvas course. Each course specifies the potential roles or tasks one may perform while working within their college offices. Understand and identify the required and recommended courses you will need to complete based on your role and the functions you perform. Supervisors will use the [Staff Training Participation Application Course Checklist](#) to assign the required and recommended ctcLink self-paced courses to employees based on roles and tasks performed.

☐ [Onboarding Additional Resources](#)

Access a comprehensive list of a variety of ctcLink related references and resources.