# Governors State University
Student Affairs and Enrollment Management: Reaching Vision 2020

**Focus Area:  Financial Aid and Literacy**

**Leader(s):  Dr. John Perry, Director of Financial Aid and Matt Zarris, Assistant Director of Financial Aid**

**Implementation Year:  2016 - 2017**

**Goal 2:** Simplify the student financial aid process for students while maintaining efficiency and accuracy of processing.

| Objective 1: | **Implement the use of a document imaging system.**<br><br>This would allow for files to be stored electronically which saves a great deal of space as well as provides a more secure environment for confidential information.  This would also create a considerably quicker and easier level of accessibility for our staff to view and/or update files.<br><br>In addition to storing files electronically, a campus-wide document imaging system will allow the Office of Financial Aid to establish electronic workflows thereby creating a "paperless" office. |
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| **Action Items** | Begin the development and implementation of a new campus-wide document imaging system |
| **Indicators and Data Needed** (Measures that will appraise progress towards the strategic objective) | Administrative approval and funding |
| **Responsible Person and/or Unit** (Data collection, analysis reporting) | This will include many individuals from the entire campus but John Perry and Sylvia Ponce De Leon will be responsible for the Office of Financial Aid |
| **Milestones** (Identify Timelines) | Dependent on approval and purchase |
| **Desired Outcomes and Achievements** (Identify results expected) | Develop a more robust document imaging system that will prevent loss of documents, provide better file security & confidentiality, and streamline processing. |

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| **Objective 2:** | **Properly informing and training the Office of Financial Aid staff on the continually changing rules and regulations of state and federal financial aid. This will be done through in-house training and attendance at professional organization training meeting/workshops. We have also begun taking minutes during staff meetings, and then disseminating them to all staff subsequent to each meeting.** |
| **Action Items** | Group training during FA department meeting times<br>Individual training sessions |
| **Indicators and Data Needed** (Measures that will appraise progress towards the strategic objective) | Decrease in errors on verification files<br>Decrease in issues/findings with audit |
| **Responsible Person and/or Unit** (Data collection, analysis reporting) | John Perry; Sylvia Ponce De Leon |
| **Milestones** (Identify Timelines) | Monthly or Semi-monthly training sessions |
| **Desired Outcomes and Achievements** (Identify results expected) | Develop FA staff to have a deeper and fuller understanding of the financial aid process |

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| **Objective 3:** | **Continue to maintain our flexible, open-door policy, allowing for walk-in appointments, regardless of the day of the week, or the time of the year. In that same vein, refuse to compromise our policy of returning phone calls/emails within one business day.** |
| **Action Items** | Continue to allow students to meet with FA advisors with and without appointments<br>Develop training manual for FA student employees so they can better assist students |
| **Indicators and Data Needed** (Measures that will appraise progress towards the strategic objective) | Less student complaints<br>Less phone calls<br>Increased knowledge of students |
| **Responsible Person and/or Unit** (Data collection, analysis reporting) | Sylvia Ponce De Leon; Matt Zarris |
| **Milestones** (Identify Timelines) | August 2016 – Start of term and evaluate against prior year |
| **Desired Outcomes and Achievements** (Identify results expected) | Reduced student questions/issues/complaints<br>Increased favorability with FA |

| Objective 4: | **Develop a new process for the reaffirmation of student loans so that students can continue to receive other types of Title IV aid even though they have exceeded borrowing limits.** |
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| **Action Items** | Review FSA Handbook<br>Create a new policy for reaffirmation and train FA staff |
| **Indicators and Data Needed** (Measures that will appraise progress towards the strategic objective) | FSA Handbook<br>New CRI communication codes to track |
| **Responsible Person and/or Unit** (Data collection, analysis reporting) | John Perry; Sylvia Ponce De Leon |
| **Milestones** (Identify Timelines) | August 2016 |
| **Desired Outcomes and Achievements** (Identify results expected) | Provide greater clarification to FA Advisors and students about the reaffirmation process. |

| Objective 5: | **Update the process for verifying homelessness status for undergraduate students, making it less complicated and invasive for our students.** |
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| **Action Items** | Review FSA Handbook<br><br>Streamline the policy/procedures for verifying homelessness and train FA staff |
| **Indicators and Data Needed**<br><br>(Measures that will appraise progress towards the strategic objective) | FSA Handbook |
| **Responsible Person and/or Unit** (Data collection, analysis reporting) | John Perry; |
| **Milestones**<br><br>(Identify Timelines) | August 2016 |
| **Desired Outcomes and Achievements**<br><br>(Identify results expected) | Provide greater clarification to FA Advisors and make things less complicated/invasive for students pertaining to the homelessness verification process. |