

**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: 2018 - 2019**

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

<b>Objective 1:</b>	<p><b>Continue the implementation of the document imaging system.</b></p> <p>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.</p> <p>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.</p>
<b>Action Items</b>	Continue the development and implementation of a new campus-wide document imaging system
<b>Indicators and Data Needed</b> (Measures that will appraise progress towards the strategic objective)	Administrative approval and funding
<b>Responsible Person and/or Unit</b> (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
<b>Milestones</b> (Identify Timelines)	19-20 Processing of FA files
<b>Desired Outcomes and Achievements</b> (Identify results expected)	Develop a more robust document imaging system that will prevent loss of documents, provide better file security & confidentiality, and streamline processing.

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

<p><b>Objective 2:</b></p>	<p><b>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.</b></p>
<p><b>Action Items</b></p>	<p>Group training during FA department meeting times Individual training sessions</p>
<p><b>Indicators and Data Needed</b> (Measures that will appraise progress towards the strategic objective)</p>	<p>Decrease in errors on verification files Decrease in issues/findings with audit</p>
<p><b>Responsible Person and/or Unit</b> (Data collection, analysis reporting)</p>	<p>John Perry; Sylvia Ponce De Leon</p>
<p><b>Milestones</b> (Identify Timelines)</p>	<p>Monthly or Semi-monthly training sessions</p>
<p><b>Desired Outcomes and Achievements</b> (Identify results expected)</p>	<p>Develop FA staff to have a deeper and fuller understanding of the financial aid process</p>

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

<b>Objective 3:</b>	<b>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.</b>
<b>Action Items</b>	Continue to allow students to meet with FA advisors with and without appointments Develop training manual for FA student employees so they can better assist students
<b>Indicators and Data Needed</b> (Measures that will appraise progress towards the strategic objective)	Less student complaints Less phone calls Increased knowledge of students
<b>Responsible Person and/or Unit</b> (Data collection, analysis reporting)	Sylvia Ponce De Leon; Matt Zarris
<b>Milestones</b> (Identify Timelines)	August 2018 – Start of term and evaluate against prior year
<b>Desired Outcomes and Achievements</b> (Identify results expected)	Reduced student questions/issues/complaints Increased favorability with FA

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

<b>Objective 4:</b>	<b>Communicate and promote the new FA Self-Service module in myGSU portal.</b>
<b>Action Items</b>	Train staff to mention Self-Service in advising sessions, phone calls, emails, etc.  Create tutorials and send to students via email
<b>Indicators and Data Needed</b> (Measures that will appraise progress towards the strategic objective)	Students will reference Self-Service in their interactions with FA staff.
<b>Responsible Person and/or Unit</b> (Data collection, analysis reporting)	Staff in the Office of Financial Aid
<b>Milestones</b> (Identify Timelines)	Continuous
<b>Desired Outcomes and Achievements</b> (Identify results expected)	Provide an easy-to-understand platform for students to determine where they are in the financial aid process.