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: 2017 - 2018

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

<table>
<thead>
<tr>
<th>Objective 1:</th>
<th>Implement the use of a document imaging system.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Begin the development and implementation of a new campus-wide document imaging system</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Indicators and Data Needed (Measures that will appraise progress towards the strategic objective)</th>
<th>Administrative approval and funding</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Responsible Person and/or Unit (Data collection, analysis reporting)</th>
<th>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</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Milestones (Identify Timelines)</th>
<th>Dependent on approval and purchase</th>
</tr>
</thead>
</table>

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

**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  
|              | Individual training sessions |

| Indicators and Data Needed (Measures that will appraise progress towards the strategic objective) | Decrease in errors on verification files  
|                                                                                       | 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 |
**Goal 2:** Simplify the student financial aid process for students while maintaining efficiency and accuracy of processing.

### 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
- 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
- Less phone calls
- Increased knowledge of students

### Responsible Person and/or Unit (Data collection, analysis reporting)
Sylvia Ponce De Leon; Matt Zarris

### Milestones (Identify Timelines)
August 2017 – Start of term and evaluate against prior year

### Desired Outcomes and Achievements (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.

#### Objective 4:
Communicate and promote the new FA Self-Service module in myGSU portal.

#### Action Items
- Train staff to mention Self-Service in advising sessions, phone calls, emails, etc.
- Create tutorials and send to students via email

#### Indicators and Data Needed
(Measures that will appraise progress towards the strategic objective)
- Students will reference Self-Service in their interactions with FA staff.

#### Responsible Person and/or Unit
(Data collection, analysis reporting)
- Staff in the Office of Financial Aid

#### Milestones
(Identify Timelines)
- January 2018

#### Desired Outcomes and Achievements
(Identify results expected)
- Provide an easy-to-understand platform for students to determine where they are in the financial aid process.