

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: Results and Analysis for 2016 – 2017 Objectives

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

Objective 1:	<p>Implement the use of a document imaging system.</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>
Action Items	Begin the development and implementation of a new campus-wide document imaging system
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.
Achieved Outcomes and Results	This objective was not completed. Admissions and Registration were given priority for the first phase of implementation. Financial Aid will be part of phase two.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY17 Objectives.)	This objective will be carried over to the next year.

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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 Individual training sessions
Desired Outcomes and Achievements (Identify results expected)	Develop FA staff to have a deeper and fuller understanding of the financial aid process
Achieved Outcomes and Results	We have been holding training sessions as needed. When a computer is needed, we hold these training sessions in the Cube. We are also taking department meeting minutes. As it pertains to more specific processes, we have implemented a system of cross-training to provide a greater depth of knowledge within the office.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY17 Objectives.)	Our staff now has a better method of staying informed on changes that occur within the office.

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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 Develop training manual for FA student employees so they can better assist students
Desired Outcomes and Achievements (Identify results expected)	Reduced student questions/issues/complaints Increased favorability with FA
Achieved Outcomes and Results	Students have a variety of ways to communicate with our office including telephone, email, dropping by the front window, drop-in appointment with an advisor, or a scheduled appointment. There is absolutely no reason for a student to say that they cannot speak with a financial aid representative. We created a manual for our student employees so that they could gain a better understanding of the financial aid process and frequently asked questions.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY17 Objectives.)	Both action items have been achieved with positive results. We get very few complaints about the Office of Financial Aid and our student employees are well trained to assist with everyday student questions and issues.

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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.
Action Items	Review FSA Handbook Create a new policy for reaffirmation and train FA staff
Desired Outcomes and Achievements (Identify results expected)	Provide greater clarification to FA Advisors and students about the reaffirmation process.
Achieved Outcomes and Results	A new process was created and shared with the financial aid advisors that provides greater clarification on the loan reaffirmation process.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY17 Objectives.)	The result of this changed has provided clarity to the advisors and centralized the process so that everyone is treating these situations in a similar method.

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Objective 5:	Update the process for verifying homelessness status for undergraduate students, making it less complicated and invasive for our students.
Action Items	Review FSA Handbook Streamline the policy/procedures for verifying homelessness and train FA staff
Desired Outcomes and Achievements (Identify results expected)	Provide greater clarification to FA Advisors and make things less complicated/invasive for students pertaining to the homelessness verification process.
Achieved Outcomes and Results	We updated our forms and trained the financial aid staff on the new process for verifying homelessness. This was all accomplished according to federal regulation.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY17 Objectives.)	This change makes for a much less invasive process in verifying homelessness among our students. This makes for a faster process and affords the student more respect.