

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.

Objective 1:	<p>Continue the implementation of the 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	Continue 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)	19-20 Processing of FA files
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.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY19 Objectives.)	The document imaging system has been set up and testing has been taking place. For the 2019-2020 academic year, the Office of Financial Aid will continue with paper files but also image the documents. For 2020-2021, it is planned to go paperless.

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<p>Objective 2:</p>	<p>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.</p>
<p>Action Items</p>	<p>Group training during FA department meeting times Individual training sessions</p>
<p>Indicators and Data Needed (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>Responsible Person and/or Unit (Data collection, analysis reporting)</p>	<p>John Perry; Sylvia Ponce De Leon</p>
<p>Milestones (Identify Timelines)</p>	<p>Monthly or Semi-monthly training sessions</p>
<p>Desired Outcomes and Achievements (Identify results expected)</p>	<p>Develop FA staff to have a deeper and fuller understanding of the financial aid process</p>
<p>Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY19 Objectives.)</p>	<p>We continue to keep current staff updated on the changes to state and federal regulations. We are also working at training new staff to fully understand the depth and breadth of financial aid.</p>

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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
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 2018 – Start of term and evaluate against prior year
Desired Outcomes and Achievements (Identify results expected)	Reduced student questions/issues/complaints Increased favorability with FA
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY19 Objectives.)	We continue to maintain a flexible office by allowing drop-in appointments, returning phone calls and emails in a timely manner, and offering quick assistance at our front window.

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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)	Continuous
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.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY19 Objectives.)	The FA Self-Service module continues to be an invaluable tool for students to access and review their financial aid. We continue to make necessary updates as needed.