

Student Service

Goal Description

To increase the quality of customer service provided to our current and prospective students.

Related Items/Elements

Reduce Student Contact During Peak Times Through Proactive Outreach Efforts

Performance Objective Description

The Financial Aid & Scholarships Office will see a reduced number of office visits and phone calls during peak times by proactively reaching out to students in a variety of ways.

Improve Efficiency of Submitting Paperwork

KPI Description

Currently, our forms are made available through the students' MySam portals where they can view incomplete requirements and then fax, mail or hand deliver the documents to our office. We are in the infant stages of implementing Adobe Sign to assist with students completing forms and submitting them electronically to a shared inbox.

There are concerns with being able to provide both student and parent signatures for our dependent students. This issue is being researched for a potential alternative.

If able to effectively implement this change, it would drastically cut down on paper used in the office as well as be able to more efficiently process incoming documents. There would not be a 24 delay in being able to retrieve a document from the imaging system as it would be copied over to BDMS upon receipt from the student.

Results Description

This is a new initiative and at this time, there are no results.

Improve Document Submission Accuracy/Efficiency

Action Description

A committee within the office is working with IT to identify a program to use for students to be able to electronically submit their paperwork. This assists in the efforts to go paperless but it also will improve submission time resulting in more timely verification and awarding.

This is a new initiative that is being researched and is in ground breaking stages for our office.

Proactive Outreach

KPI Description

After surveying the student type most seen in our office during peak times, it has been determined that the vast majority are returning students (not new students).

We will develop financial aid informational videos with the assistance of campus resources. We plan to develop a series of videos to target items such as completing the FAFSA, processing loans, explaining Satisfactory Academic Progress, etc.

Currently, our efforts have resulted in a 16% decrease in traffic at our front counter and a 37% decrease in phone calls. The calls may be skewed as we made necessary adjustments due to shortness of staff during the hiring freeze. Typically, our call queue can handle up to 26 calls, we reduced this to 13 calls. Also, due to the hurricane, we were closed the last week of August. Numbers for this week were gathered from the first week of September.

We will continue to compare office traffic and phone calls during our peak time in August to determine if our increased efforts seem to have made an impact.

Results Description

To assist continuing students, we have been present in the mall area outside of the LSC with an informational table where students can ask questions about completing the FAFSA and our staff can express the importance of meeting priority deadlines. We saw a 27% increase in ISIR's this year.

We continue to participate in the SMMC Financial Literacy Week to educate students about the FAFSA and financial aid opportunities.

Peak time numbers (Phones/traffic).... coming soon!

Decrease Traffic and Calls During Peak Times

Action Description

During the month of August, our office sees significant increases in both student traffic and phone calls.

For the 2017-18 year, we will continue verifying student files on the spot to shorten the time it takes to verify and award a student. Through the use of the reports in My Success Planner (MSP) we will be able to determine the issues that students were visiting and calling our office. We can then seek to improve that process by providing a more transparent process in the event of the PLUS loans and providing more information in the case of Refunds.

The on campus outreach initiative started in spring of 2016 will continue to target returning students and assisting them with completing their files before they depart campus for summer break. More collaborations will happen with the Student Money Management Center to provide workshops to students on campus.

Update to Previous Cycle's Plan for Continuous Improvement

Previous Cycle's Plan For Continuous Improvement (Do Not Modify)

The Financial Aid and Scholarships Office is driven on numbers and data. Through the continuous collection of information, we will continue to improve processes and strive to work smarter.

SAP 2 emails and counseling for those students will assist in unnecessary appeal cases. Students will be more educated on how to get back into compliance rather than being ignorant to the process.

Communication with students, faculty and staff will improve the scholarship application process and continue to provide an increase in scholarship applications as well as compliance with departments to use the software.

Customer Service is key. Constant training and education is necessary to provide each employee with the information needed to provide the best response to student questions. An understanding of the full financial aid process is necessary to alleviate return visitors and repeat phone calls.

Verification implemented verifying students as they come into the office and sending corrections at that time. This relieves the verification staff from working inaccurate documents on their pending report as they are reviewed by a verification analyst or counselor trained in verification.

Reports from My Success Planner will be utilized to target specific issues where we are lacking communication on a process and prompt proactive outreach to alleviate the issues during peak times (August).

Update of Progress to the Previous Cycle's PCI

The new initiative of the SAP 2 email went into place in the spring 2017 semester. This resulted in a 1% decrease in the number of students who go from a warning SAP to a bad/ineligible SAP.

Our efforts for decreasing peak traffic and phone calls is skewed due to being short staffed and the hurricane. With a third of the office down, we opted to reduce the call queue from 26 to 13 calls, so it could have potentially appeared that less calls were received. Due to being closed the week of the hurricane, we collected the numbers from the first week in September to make up for what would have been the first full week of classes. We will continue to measure this to determine how our efforts are assisting.

With the verification area being down, assistance was received from various areas, but unfortunately it was not enough to stay caught up. We have learned from the personnel changes that were made.