

BEST PRACTICES, Financial Aid

Title: Improving the Exiting Process For Students with Financial Indebtedness

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Source: Medical University of South Carolina

Co Area:

Addl Info: http://www.sacubo.org/sacubo_resources/best_practices/2003.html

Abstract: The Division of Finance and Administration at the Medical University of South Carolina is committed to innovation and the delivery of excellent services. Beginning in 1997, the Division initiated a Continuous Quality Improvement Program (CQI). One of our pilot projects was the redesign of our student loan exit interview process that was plagued with customer service problems. Over the course of many years, this process of exiting students with financial indebtedness, had failed to meet the customer demands resulting from dynamic changes within the University's academic community. The University exits between 500 to 600 students annually.

In the late summer of 1998, a team comprised of a cross section of university staff, students, and faculty was assembled. This team known as SLEIC (Student Loan Exit Interview Committee) defined their mission as follows: "To improve and streamline the student exit interview process in order to ensure compliance with all regulations. This process will be effective and efficient with measurable outcomes and clearly defined responsibilities. The process will contain accurate and timely information, well-defined procedures, and effective communication among all parties."

The group was trained in the principles and techniques of CQI. By applying these tools and focusing on communication, the team designed and implemented a very effective and efficient solution. Over the course of 3 ½ years the group took a system lacking a customer connection (SLACC), and evolved it to a web accessible on-line process available to customers 24 hours a day. With our graduating class of May 2002, all student loan exit interviews were conducted on-line.

BEST PRACTICES, Financial Aid

Title: Emergency Loan # 197

Source: Texas A&M University **Co Area:**

Addl Info: http://www.sacubo.org/sacubo_resources/best_practices/2002.html

Abstract: The Division of Finance, led by Vice President Bill Krumm, has business objectives that include the vision to be an organization knowledgeable of its customers and understanding of their unique needs as well as an innovative organization that anticipates the future and rapidly evolves by encouraging creative thinking and innovative use of technology throughout the organization. With these two objectives in mind, the Department of Student Financial Services designed and implemented an on-line Emergency Tuition and Fee Loan (ETFL) process that would not only serve our customers when THEY wanted to be served but also create efficiencies within the department.

The State of Texas Education Code Chapter 56 allowed higher education institutions to establish emergency loan programs under which students are loaned money to pay tuition and fees. As the name of the loan fund implies, students often do not realize they need the funds until just before the tuition and fees due date - thus causing the majority of the loans to be applied for, approved and posted within the last day or two of the institution's financial due date for tuition and fees. Before the online system was developed, students needing loans had to come, apply, and sign a promissory note each semester - a very labor and time intensive process. Staff and overtime budgets were taxed to their limits during these periods. The on-line ETFL process was designed to meet this challenge. The loan process begins with a Master Promissory Note (MPN) that, once signed, is used to facilitate subsequent semesters' loan requests. Students who have signed the MPN can then apply for an ETFL without visiting the Student Financial Services office.

The proposal describes a front-end and a back-end process.

Title: SUNY Best Practices Search Facility # 480

Source: State University of New York **Co Area:**

Addl Info: <http://www.suny.edu/BestPractices/Best.Practices.2004.01.27.pdf>

Abstract: As part of the Task Force on Efficiency and Effectiveness, campus presidents were asked to provide initiative they believe they carry out better than any other campus, along with those innovative ideas that have saved or avoided spending resources. The "Best Practices" reported in this document have resulted in significant savings throughout SUNY and, when shared with other campuses, have the potential to realize even greater savings within the system.

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E-signature Process
Federal Quality Assurance Program
Web Processing of Financial Aid
Business Reply Envelope
Online Exit Interview
Web-based Student Inquiries

BEST PRACTICES, Financial Aid

Title: Comprehensive Online Federal Aid Student Self-Service

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Source: University of Mississippi

Co Area:

Addl Info: http://www.sacubo.org/sacubo_resources/best_practices/2007.html

Abstract: As part of the implementation of SAP and Sigma ProSAM, the University of Mississippi (UM) has expanded and enhanced online student self-service offerings on all fronts but especially in the area of financial aid. Students are able to view award information, accept/reject/lower awards, and find out about actions needed by them in the form of “diagnostic messages,” all online and in real-time. As students interact with the system, financial aid award notices are captured as dynamically-generated PDF documents and stored in UM’s digital imaging system for future access by financial aid counselors as they guide students through the process. This past fall, UM pushed the envelope further by introducing a new consolidated scholarship application that applicants can complete as part of the admissions process or at a later date, whichever they prefer.