



ProVerify - Automated Verification Services

<https://www.proed.org/services/>

ProEd's Software-as-a-Service (SaaS) solution "ProVerify" performs automatic verification of ISIR data. Students and their parents DO NOT have to obtain a tax transcript from the IRS. We do it for them! To complete the verification process, all students need to do is complete an eSigned:

- (1) Verification Worksheet
- (2) IRS 4506-T Form

That's it! We retrieve electronic tax transcripts directly from the IRS within 72 hours of completion of the IRS Form 4506-T. This dramatically reduces the time to verify aid applications so that students can enroll more quickly, thereby increasing the institution's cash flow earlier in the process. ProVerify allows students to interact with the financial aid office in a paperless, mobile, and efficient way.

"Our ability to retrieve electronic IRS data directly within 72 hours or less is a real game changer – both for students and financial aid staff. It is a giant leap forward from anything currently in the marketplace. I am certain it will have a profound positive impact on students and colleges and universities." – Dr. Paul Gilroy, President & CEO.

## COMPREHENSIVE CONSULTING

ProEd provides a wide variety of general financial aid consulting, outsourcing and auditing services. Because we employ financial aid professionals only, we are in the unique position of having subject matter experts on virtually every financial aid topic.

## COMMUNICATIONS SERVICES

Our team of experienced, higher education professionals, work seamlessly with your students and parents using our state-of-the-art communication platform. From the first touch in admissions and financial aid through registration and student account payment, our team will help answer questions quickly and effectively the first time. Our cost effective services are designed to improve operational efficiency and increase student recruitment and retention.

## CALL CENTER

Our communication services are well known throughout the financial aid industry for:

- (a) high answer rate,
- (b) quick response time,
- (c) average talk time and

- (d) exceptionally low abandon rate.

The reasons for our success are the high quality, speed and efficiency of our services at prices that are among the lowest in the industry. What differentiates ProEd from our competitors is our commitment to answering students' questions and not just answering the phones. Our experienced staff can answer 95% of the questions asked on the first call.

## EMAIL RESPONSE

We guarantee that our email response team will respond to student emails within 24 hours.

## REMOTE PROCESSING / OUTSOURCING

ProEd is well known for our speed, accuracy and affordable remote financial aid processing. Here are some of the main processing and audit functions ProEd performs for colleges:

- Federal Verification,
- Satisfactory Academic Progress (SAP) reviews and appeals,
- Professional Judgment (PJ) reviews,
- Return of Title IV (R2T4) calculations,
- Need analysis and corrections,
- Aid packaging and awarding (federal, state, and institutional aid),
- Perkins loans,
- Federal Work-Study administration,
- Electronic Data Exchange to include data loads and transfers, and
- Reconciling loan/grant aid discrepancies
- Direct Loan administration for standard, non-standard and clock hour programs and both Scheduled (SAY) and Borrower Based Academic Year (BBAY) programs,

Our services are high quality, speedy and affordable.

## TRAINING

As an outgrowth of ProEd's own internal Federal Student Aid training and assessment process, ProEd offers this service to colleges and universities. Because training is so important to financial aid administration and because it is difficult to send staff to various training sites, ProEd's online Anywhere, Anytime online training platform is self-paced and covers a wide variety of important student eligibility topics. Many of our clients have taken advantage of this training program as a way to train new entrants into the profession as well as refresh and update veteran aid officers. We have provided Title IV Federal Student Aid training to financial aid offices since 2005.

ProEd's "Anywhere, Anytime" online training and assessment services utilize professionally developed online interactive courses that provide learners with on-demand training modules. The training modules can be accessed anytime, at any location via a computer, or smart device like a smart phone or tablet. Our courses go beyond training – they also insure learning. Each training module is followed by automated assessment. The assessment provides immediate results and detailed solutions for questions answered incorrectly.

ProEd's online training modules are topic-specific. They provide detailed information in twenty to thirty minute segments. This allows learners to absorb the information and learn the topic without feeling overwhelmed or having to invest long periods of time for training. It is the most effective, efficient and cost effective way to provide financial aid training to all financial aid staff.

Now you can receive Federal Student Aid training on your PC, Tablet, or Smartphone.

## PRODOC HIGHER ED

ProDoc's web portal lets students and parents complete and e-sign school documents on any computer or smart device, including phones and tablets. It eliminates multiple processing steps including handling, scanning, linking, storing or shredding documents. This greatly reduces costs and frees up staff time to perform more essential work. Most importantly, ProDoc forms are compliant with all federal and state electronic signature requirements.

ProDoc excels in handling e-signatures from multiple parties on one or more documents. For example, students, spouses, parents, and financial aid staff can each complete and e-sign the same document. At each signature step, the signers can also have a section of the form to fill out or edit if needed.

No more incomplete or unsigned documents. ProDoc builds smart logic and error checking to insure documents are completed in their entirety. Among the many customizable features, documents can be setup to require the completion of certain data elements. They can even be set up to conditionally require data field completion. For example, if a certain box is checked it can require the completion of other data elements. Best of all, the converted ProDoc forms will look absolutely identical to the original documents.

## BENEFITS

- **Saves Money and Time:** Schools can save thousands of dollars in document handling costs by eliminating paper and static or "fillable" PDF forms to download, print and return to the aid office.
- **Improves the Student Experience:** Allows schools to communicate with students using their mobile phone. Students get immediate confirmation that their documents were received.
- **Reduction in Document Processing Time:** For example, the average processing time for schools to handle documents is up to 30 days. With ProDoc, that can be reduced to within 5 business days.
- **Availability:** Student's ability to sign any form at any time of day from any computer, smart device, i.e., phone, tablet or computer. Students and their parents complete e-sign and submit all forms online 24/7/365.
- **Secure:** ProDoc is safe and secure

## TRUST AGENTS

- **E-sign Act and UETA:** Electronic Signatures in Global and National Commerce Act (ESIGN, 2000) and the Uniform Electronic Transactions Act (UETA, 1999)

- ISO 27001: This is the highest level of global information security assurance available today.
- SSAE 16: Examined and tested business operations, systems and security requirements stipulated by the American Institute of Certified Public Accountants (AICPA). SOC2 Compliant
- PCI DSS 2.0 Compliant: Certifies safe and secure handling of credit card holder information as required by the Payment Card Industry Security Standards Council (PCI SSC)
- TRUSTe certified: Leading global privacy management solutions provider.
- S. Department of Commerce Safe Harbor: policies regarding the collection, use and retention of personal data, and abide by European and Swiss data protection laws.

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