FINANCIAL AID COMPLETION PLAN at President's Cabinet, 7/23/19
Presented by Chau Dao, Ed.D.

Automation of Verification Process and Online Forms with ProVerify software
- Total number of Mt. SAC files selected for verification = 6,665
- Total number of Mt. SAC files complete to date (as of 9:30am EST 7/19/19)= 1,487
- Average number of Days in Process = 24 days (this is unusually high compared to our other clients because files are sitting in the Mt. SAC pending queue aging)*
- Fastest Processing Time is 0 Days for Files that are Auto-Complete (this is in seconds if family uses IRS Data Retrieval Tool)
- Selected for institutional and/or SAR Comment Code verification = 1,254
    - Reviewed and completed by our staff = 794
- Total selected: 6,665 + 1,254 = 7,919
    - Total completed: 1,487 + 794 = 2,281
- Number of emails sent to students by ProVerify to date = 82,438
- Number of voice blasts sent to student by ProVerify to date = 18,690
- Number of calls- Mt. SAC has not purchased ProVerify Call Center Services for in-bound calls.
- Consistently have about 500 files that need FA staff to review(*); this is what is causing the processing average lengthen; more complicated documents – staff has to review and work with family
- 2018/2019 total selected for verification 12,257 with 1,008 files completed and reviewed by July 22, 2018

Implementation of Rapid Automation this week (Ellucian and IT)
- Software mimics human ability to transfer and rename files, but much faster and in batch processing without the human error.
- Cost analysis: weekly reduces 8 to 10 hours of manual file transfer and renaming to just minutes; allowing FA Systems team to work on other enhancement projects in the pipeline

Inreach/Outreach Unit Solidified with Identified Projects
- FA Manager, and 2 FA Specialist with 9 other FA Specialist to support when needed
- Permanent FA Lab staffed with FA Specialist, not just Student Assistants – using Career/Transfer computers, students can come by for application, verification, scholarship, student portal, refund preference, etc.
- Social Media Campaign – Instagram and Facebook to begin to push out messaging, important dates, etc.
- Calling Campaign to align with the ProVerify ageing report – after 21 days, unit will call each student to reach out to offer assistance with completing FA file. Each staff member *will be assigned case files* to manage with FA Manager of Unit *to monitor/track*.
- Create checklist for student to take with them when they come to the Front Counter; sometime they leave and forget what FA staff tell them they need to do.
- Create Packet Guide: How to file for FA, What happens next after I file for FA?, and more importantly how/why FA can help me? – all in *student speak*!
- Intentional collaboration with Programs – Financial Aid and Academic Progress
    - Counseling: SAP prevention, SAP Appeal, Financial Literacy Pilot with CO

- o   Athletics and Student Equity: FA Specialist in the WINN and Student Equity Centers similar to what we are doing with Dream Program
- o   FA Specialist in ACCESS program to help ACCESS student understand FA and SAP
- o   Library and Tutoring Centers
- o   Instruction: send notification to Faculty at key drop points in the term to identify students at risk of failing – SAP prevention

Aggregate Difference between 2017-2018 vs. 2018-2019
Transition of Summer term from Header term to Trailer term in academic year; pivot year was 2017-2018, thus 2017-2018 total, include two Summer terms (Summer 2017 and Summer 2018). For 2018-2019, Summer 2019 is part of 2018-2019, which is still being processed.

2017-2018
Summer 17: 3,557 Pell counts = $2.5 million
Fall 17: 10,025 Pell counts = $19.7 million
Spring 18: 9,202 Pell counts = $19.1 million
        TOTAL $41.3 million (Sum 17, Fall 17, Sp 18)

Summer 18: 2,078 Pell counts = $1.6 million
        TOTAL $40.4 million (Fall 17, Sp 18, Sum 18)

2018-2019
Fall 18: 8,661 Pell counts = $17.6 million
Spring 19: 8,338 Pell counts = $17.8 million
Summer 19: 1,805 Pell counts = $1.5 million*
        TOTAL $36.9 million (Fall 18, Sp 19, Sum 19) *still processing*

2018-2019 Calling Campaign – Ad Hoc Completion Plan
Narrowed down to 1,687 incomplete files – students in 6 units or more
        Called as many as possible, also asked for assistance from Special Programs
        304 files were completed – 18% rate