

Lock Haven University  
of Pennsylvania

# Student Financial Services Plan



2008-2010

**October 16, 2007**  
**Student Financial Services Resource Plan for 2008 – 2010**

A. Three areas of operation:

1. Customer Service

- a. Goal - The Continued enhancement of telephone and walk in service for all customers of SFS.
  
- b. Goals Completed –
  - 1. Improved VOIP customer service. Calls are tracked for length and waiting time. Currently, SFS is receiving over 2500 calls a month. Statistics are being monitored each month for customer service levels. Personnel received additional training on customer service issues.
  
- c. New Goals –
  - 1. Increase staff size by one person. Counselor being hired to work with at risk students. Position funded by small university initiative money. Counselor will handle customer service issues and be a resource for other SFS personal.
  - 2. Offer additional staff training in all areas.

2. Student Accounts

- a. Goals Completed –
  - 1. The use of document tracking and CARS contacts related to automated SFS processes will be expanded. The benefits of document tracking are 3-fold: contacts act as a tickler and tracking system for various automated processes; contact data serves to increase staff productivity as less time is devoted to the “file chase” and contacts enhance customer service as student information is readily available and accessible by all in the CARS system.
  
- b. New Goals –
  - 1. E bill, need to develop this process and do away with most of the bill mailings. This will be cost savings to the University. Projected July 2009.
  - 2. Web based billing and account access will be priority items for Fall 2008. This will eliminated “paper” and provide the students with access to information in a timelier manner.

3. Use direct deposit for loan refunds. This will cut down on the amount of walk in traffic, which currently averages over 1500 students a month, anticipate FA 2009 or FA 2010.
4. Use third party vendor to assist with collection process of past due receivables. Will improve overall efficiency of SFS, SP 2008.
5. Switch to electronic lock box reporting. Improve overall Efficiency of SFS, SP 2008.
6. Pay connexion from JP Morgan Chase – for student credit card payment – for end of April 2008. This represents a \$150,000 cost savings to the university in yearly credit card fees.
7. RFP for payment plan provider – ready to implement July 2008 Current provider has no contract, need to do to increase customer service and to decrease LHUP’s handling of these transactions and to improve customer service and student account collections.

### 3. Financial Aid

#### a. Goals completed –

1. Web based access to financial aid for all users.
2. Total integration of financial aid model with student accounts and PHEAA
3. Summer 2007 paperless financial aid awards successful.
4. Staff training, off site training for 2 staff members for one week in financial aid basics.

#### b. New Goals –

1. Implement electronic alternative loan process.
2. Auto package for Financial Aid. This is increase customer service by allowing SFS decreasing the time it takes to generate an award letter. LHUP currently has the module. IT checked with Jenezabar and they recommend sending a trainer here to train staff on use of the module, anticipated Fall 2009.
3. Convert to Wolfpac/Campus Management, Fall 2010.