

Lock Haven University  
of Pennsylvania

# Student Financial Services Plan



2006-2008

December 12, 2005

## Student Financial Services Resource Plan for 2006 – 08

### Phase I

#### A. Reorganization

Student Financial Services (SFS) represents the combined offices of Financial Aid and Student Accounts. The reorganization has the purpose of providing improved customer service by combining like areas into one service point for students, parents and other stakeholders, a “one-stop” shop.

SFS employees will be designated as having financial aid responsibilities or student account responsibilities. Individuals that are designated as FA employees will not have the ability to modify any SA records and the reverse is also true. This is a management control accounting safe guard.

##### 1. Three areas of operation:

###### a. Customer Service

Two areas will be enhanced: telephone and walk in service.

All telephone calls will be directed to one extension, this extension will be manned by two full time customer service representatives. These employees will be more than “receptionist” they will be problem solvers. Each will be a generalist but each will have expertise either in SA or FA. The goal is to solve the student’s issue and not have to transfer the call. These people will be trained in all customer service aspects of SFS. Voice mail will be used to handle overflow calls, with all calls being returned within a 24 hour period. Telephone menu items are being explored that will offer students a choice of services from SFS.

All walk-in traffic will be handled in one area. This area will have to be physically modified in order to offer students a degree of privacy. All walk-in traffic will be handled in this manner. The walk-in traffic will be handled by at least one to two full time customer service representatives depending on volume. Each having generalist knowledge of all aspects of SFS, but in addition each individual employee will have expert knowledge in either SA or FA.

## b. Student Accounts

Two Employees will be assigned the task of operating the SA tasks. Accounts Receivable activities and collections will be assigned to one employee. This employee will have designated authority to lift and place holds, account maintenance, collection authorization and procedures. The other employee will handle all the automated processes: billing, loans, credit cards, lock box and AES. Russell 121 will be the area for this.

These employees will assist the customer service representatives with student issues.

## c. Financial Aid

The function of financial aid will be done in Russell 118. This is the “hub” of SFS. All of the financial aid files will be located here. Grant processing, award origination, verification origination and progress origination will be here. Students requiring additional service will be handled by two SFS representatives in this area.

Another goal of financial aid is the standardization of all aid at LHUP. The office of SFS should record all aid awarded to our students. This allows us to produce necessary reports for accountability purposes to stakeholders which include the state and federal government.

All scholarships, grants and tuition waivers need to be awarded through SFS. All students need to be notified of these awards by the office. All entities can recommend students for these scholarships, and recommendations will be followed by the office of SFS. All aid awarded is countable aid, the aid must be sent via FA to SA in the office of SFS. To do this all campus based (foundation, athletics, international and employee waivers, other scholarships) will be asked to join a committee for best practice and recommendations on delivering aid to the students via SFS. This revised and improved process will be in place for Fall 2006.

To safeguard information all employees of SFS will sign confidentiality statements that remind employees of need to keep all information confidential. Note: student workers will also sign these statements.

## B. Computerization

The ability of the staff of SFS to function rests on the use of information more precisely the communication of information. Currently, student account information is handled effectively by the CARS system. However, Financial Aid information is not. Financial aid makes use of the PHEAA processing system with an interface to the CARS system. This gives the campus limited use of the Financial aid information that is available via the Department of Education, for student issues.

The PHEAA system is used but has limited availability for all staff and has limited information. PHEAA access for the entire staff has already been implemented. Training on the PHEAA system will start in mid November, and will finish with representatives from PHEAA doing formalized training in January 06. .

Discussions are continuing about using CARS in the manner in which it was intended but there has been concern that SAP Campus Management implementation will require an additional conversation. Inquiries about the WolffPack implementation were made, checking with the IT department it was agreed on that WolffPack should not be brought up separate from Campus Management. Also, Phase One implementation of campus management will involve 4 schools who will be the "Phase I" schools to demonstrate the effectiveness of the combination of WolffPack and SAP Campus Management. The implementation dates for these 4 schools is still being planned by the SYTEC leadership and has not been published at this time.

Without the computer information, the sharing of information and the solving of student issues is problematic. Training on the CARS system is being conducted, including site visits to other colleges that use CARS and to Cincinnati to receive training on the FA module.

## C. Training

Staff training has begun with all employees of the SFS documenting their respective jobs and procedures. All current jobs and procedures have been documented. Process flows are being done in order to establish functionality groups. Functionality groups are procedures and processes that can be tied together. These are jobs that can be usually be done by the same individual. This helps to streamline processing and add to productivity.

Cross training of SFS employees started mid November and will continue through out the first quarter of 2006. SA employees will be trained on FA issues and FA employees will be trained on SA issues. Customer service employees will be trained on issues that relate to the servicing of customers. The new customer service function should be up and running after the 1<sup>st</sup> quarter of 2006.

CARS training will be on going. The director and assistant director will be making site visits to other colleges that are using CARS in financial aid processing, to pick up "best practices." Formal financial aid training was scheduled by Jenzabar during first week of December. The Director, Assistant Director and IT staff received specific training on the CARS financial aid program and then will train the rest of the staff.

February 2006 will be the start of the new awarding cycle. The goal will be to have the system (part of) up and running in order to produce financial aid information at that time. This is a very ambitious goal which might be modified depending on training.

## D. Physical Space

Changes to the physical space need to be done in order to enhance the service for both the telephone customers and the walk-ins.

The telephone area will be in 118 Russell. This will take a minimum of physical configuration. Phone and computer lines will have to be moved. One other full time work station (desk, computer and phone) will have to be established. The area in 118 Russell should accommodate three work areas and a fourth area for student workers. Cubicle construction is being considered in order to decrease the noise level in the office and offer a more professional work space.

Walk-in traffic will be handled in a different area. Currently, all walk-in traffic is handled in the hallway of 1<sup>st</sup> floor Russell between the offices of FA and SA. This is not a good situation, as there can be no privacy when talking to students. Construction is proposed to change this. Room 123 will be converted to a counter area with two work stations. This will be connected by an internal door to Room 121. The counter area will be structured like that of a bank, offering students an opportunity to take care of their business in a more private manner. Students requiring additional support will be given appointments to see other staff members that can help them with their particular issues. Cubicle construction is being considered in Room 121, for noise reduction and confidentiality.

The office construction for Room 123 will not start until Summer with the goal of being completed before fall term commences.

#### D. Time Line

1. Training – Cross Training start in depth training November through the first quarter of 2006. CARS training – late November, early December 2005 and on going.
2. Computerization of FA - after training, work for implementation of FA module starting in February 2006.
3. SFS phone customer service – should be up by end of first quarter 2006, depending on training and computerization.
4. Walk-in traffic customer service – ideally this should begin at the same time as phone customer service.
5. Physical space conversion – for phone area – Summer 2006. For the Walk – in traffic projected start date will be beginning of summer and end date will be before classes begin for fall 2006- 2007.

Cubicle construction will be postponed until 2007.