

# Utilizing Technology to Streamline Financial Aid Operations

Texas Association of Student Financial Aid Administrators

*Fall 2011 Conference*

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## Presenter

Christopher D. Murr, Ph.D.  
Director  
Financial Aid and Scholarships  
Texas State University-San Marcos



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## Purpose

This session will focus on the variety of technology solutions utilized within the Office of Financial Aid and Scholarships at Texas State University. The presentation will focus on how these solutions increase business efficiency and enhance customer service.

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## Overview

- Guiding Business Principles
- Business Challenges
- Lobby Check-In System
- Financial Aid Answer Bank
- Phone Bank Recording System
- Contact Log
- Auto-Emailers and Work Lists
- Staff Absence – Calendar System
- Document Imaging System
- Banner Scholarship Module
- Future Approaches




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## Guiding Business Principles

- Maintain compliance with all applicable federal and state financial aid rules and regulations and adhere to all ethical standards
- Provide excellent service to both internal and external customers
- Promote training, empowerment and accountability
- Seize opportunities for improvement of our business processes

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## Business Challenges

- Provide more personalized service
- Provide services beyond 8 – 5
- Assess wait times and service times
- Manage customer complaints more effectively
- Hold staff and customers accountable
- Do business faster




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# Lobby Check-In System

- Previous pull-a-number system was impersonal
- Checking-in electronically reduces student anxiety
- Check-in system allows tracking of student demographics, frequency of visits, wait time, service time, etc.
- Greater ability to hold staff and students accountable




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**Welcome to**  
**Financial Aid and Scholarships**

  
Type Your full name and reason for your visit

**THANK YOU!**

Q	W	E	R	T	Y	U	I	O	P
A	S	D	F	G	H	J	K	L	
Z	X	C	V	B	N	M	CLEAR		
BACK		SPACE							

9/16/2011 2:41:21 PM

Reason for Visit

Choose One:

My Application

My Status

My Awards

My Bill

My Check Release

General Information

Submit Documents

Other

Check your financial aid status online at MyFA [www.finaid.tststate.edu](http://www.finaid.tststate.edu)

Please Have Your **ID** Available

Copyright 2008 MedicalCheck-In Systems, Inc.

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[AS Home] [Customers] [Staff Answers] [Find Student] [Emails] [Calculators] [Work Lists] [Workspaces]

**Full Person Page for dc49**

Students Currently Waiting: 0

[View Search Student](#)  
[My Unrecorded Calls](#)

N.A.

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FAS Home | Customers | Staff Announcements | Find Student | Emails | Calculators | Work Lists | Workspaces

[Back to Full Person](#)

### Static Page

To	Name	Reason	Comments	Acknowledge
9/21/2011 1:10:44 PM	Rose Man	General Information		<a href="#">Acknowledge</a>
9/21/2011 1:10:53 PM	Joe	Other		<a href="#">Acknowledge</a>
9/21/2011 1:08:38 PM	Joseph	General Information		<a href="#">Acknowledge</a>
9/21/2011 1:06:42 PM	Patrick	My Status		<a href="#">Acknowledge</a>
9/21/2011 1:07:18 PM	Amelia	My Awards		<a href="#">Acknowledge</a>
9/21/2011 1:04:50 PM	Agathe	My Bill	ACIR	9/21/2011 1:05:49 PM

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FAS Home | Customers | Staff Announcements | Find Student | Emails | Calculators | Work Lists | Workspaces

Student ID:  Student Name: Rose Man

States:  Staff Reason: General Information

Current Title:  Personal Notes:

Follow-up Required:

N/A

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FAS Home | Calendar | Emails | Worklists | Users | Staff KB | Special | Lobby | Award Year | Stats | User Mode

## Lobby Daily Report Page

Please type a date a (using the format of 9/21/2011)

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## Summary Page

Statistics Report for Lobby Summary

Results of Search

From 3/4/2011 to 3/5/2011	Visit Stats
Number of Lobby Visits	125
Average Wait for Acknowledgement	0:53
Average Total Time (From Sign In to Check Out)	3:45
Average Talk Time	2:52

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FAS Home / Calendar / Emails / Worksheets / Users / Staff / KB / Special / Lobby / Award Year / Stats / User Mode

## Statistics Report Page

Statistics Report

General Usage		Usage By Hour		Usage by Application		Usage by Check-In User (Sem)	
Total Records	228	7:00-7:59 AM	1 (0.44%)	General Information	19	ac38	10 (4.83%)
Total Days Recorded	1	8:00-8:59 AM	3 (1.32%)	My Application	10	aa12	51 (24.64%)
Average Daily Visits	228.00	9:00-9:59 AM	25 (10.96%)	My Awards	69	ev01	29 (14.01%)
Daily Usage		10:00-10:59 AM	24 (10.53%)	My Bill	19	ja25	26 (12.56%)
Sunday	0 (0.00%)	11:00-11:59 AM	32 (14.04%)	My Check Release	21	ac38	44 (21.26%)
Monday	0 (0.00%)	12:00-12:59 PM	37 (16.23%)	Other	33	ura38	1 (0.48%)
Tuesday	0 (0.00%)	1:00-1:59 PM	28 (12.28%)	Submit Documents	13	vw02	66 (22.22%)
Wednesday	0 (0.00%)	2:00-2:59 PM	31 (13.60%)	Usage by Check-In User (Non-Sem)		aa12	9 (47.37%)
Thursday	228 (100.00%)	3:00-3:59 PM	31 (13.60%)	ev01	2 (10.53%)	ja25	1 (5.26%)
Friday	0 (0.00%)	4:00-4:59 PM	16 (7.02%)	ac38	2 (10.53%)	ur38	2 (10.53%)
Saturday	0 (0.00%)	5:00-5:59 PM	0 (0.00%)	vw02	5 (26.32%)	vw02	1 (50.00%)
				Usage by Check-In User (Re-Sem)		ur38	1 (50.00%)
						vw02	1 (50.00%)

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## Financial Aid Answer Bank

- Allows customers to get answers to their questions 24/7
- Analyzes the types of questions being asked so needed answers can be developed
- Allows students to email only after they have asked a question, thus, reducing email volume
- Reduces incoming phone calls



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TEXAS STATE UNIVERSITY

Financial Aid and Scholarships

Headlines

- New All Disbursement info for undergraduates and graduates.
- Fall 2011 Estimated Timeline for all students in January, August 2014. For more details, visit Student Financial Services.
- Fall 2011 Financial Aid and Scholarship for Undergraduate, Available for review to your student account with Student Financial Services from mid-Aug to August 19.
- Fall 2011 Financial Aid and Scholarship for Graduate Students.
- Fall 2011 Financial Aid and Scholarship for International Students.
- Fall 2011 Financial Aid and Scholarship for Hispanic Students.
- Fall 2011 Financial Aid and Scholarship for Native American Students.
- Fall 2011 Financial Aid and Scholarship for Returning Students.
- Fall 2011 Financial Aid and Scholarship for Transfer Students.
- Fall 2011 Financial Aid and Scholarship for Veterans.

MY Financial Services

Apply online for FREE!

Apply online for FREE!

Apply online for FREE!

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TEXAS STATE UNIVERSITY

Financial Aid and Scholarships

My Staff

Search

Results: 1 of 188

**Recommended Links**

- Can I get more money?
- How do I get more money?
- How do I accept my awards for Fall 2011?
- What if I can't afford to pay my bill?
- Can I use my financial aid to pay my bill?
- Can I use my financial aid to pay my bill?
- Can I use my financial aid to pay my bill?

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TEXAS STATE UNIVERSITY

Financial Aid and Scholarships

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# Phone Bank Recording System

- Eliminates the "he said . . .she said" scenario
- Allows for more effective management and resolution of customer complaints related to phone conversations
- Ensures both staff and customers are held more accountable
- Reduces staff stress

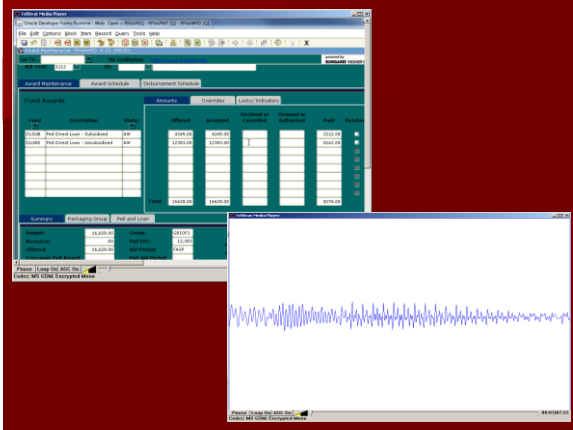


Date	Time	Day	Security	Duration
8/16/2010	7:07:23 AM	Wednesday	Enabled	0:30
8/16/2010	8:00:00 AM	Thursday	Disabled	0:34
8/16/2010	8:10:00 AM	Thursday	Disabled	0:32
8/16/2010	8:13:00 AM	Thursday	Disabled	0:33
8/16/2010	8:20:24 AM	Thursday	Disabled	0:31
8/16/2010	8:26:48 AM	Thursday	Disabled	0:58
8/16/2010	8:51:07 AM	Thursday	Disabled	1:00
8/16/2010	9:00:00 AM	Thursday	Disabled	0:34
8/16/2010	9:05:00 AM	Thursday	Disabled	0:30
8/16/2010	9:13:00 AM	Thursday	Disabled	0:36
8/16/2010	9:22:00 AM	Thursday	Disabled	0:38
8/16/2010	9:29:46 AM	Thursday	Disabled	0:35
8/16/2010	9:36:00 AM	Thursday	Disabled	0:36
8/16/2010	9:42:00 AM	Thursday	Disabled	0:34
8/16/2010	9:53:00 AM	Thursday	Disabled	0:36
8/16/2010	9:59:00 AM	Thursday	Disabled	0:36
8/16/2010	10:07:00 AM	Thursday	Disabled	0:37
8/16/2010	10:23:33 AM	Thursday	Disabled	0:34



Day	CLID	DNIS	DN	Duration (min:sec)	Port No
Wednesday	84006	84006	8:33	1:07:00	Ch1
Wednesday	84006	84006	8:33	1:07:00	Ch1
Thursday	87918	87918	8:34	1:07:00	Dem
Thursday	87918	87918	8:52	1:07:00	Dem
Thursday	87918	84006	8:13	1:07:00	Ch1
Thursday	83969	83969	10:11	1:07:00	Net
Thursday	84006	84006	8:58	1:07:00	Ch1
Thursday	88881	49213	9:58	1:08:00	Net
Thursday	88881	49213	8:34	1:07:00	Net
Thursday	83967	83969	8:02	1:07:00	Net
Thursday	88881	49213	9:22	1:08:00	Net
Thursday	88881	49213	10:46	1:08:00	Net
Thursday	88881	49213	8:05	1:07:00	Net
Thursday	88881	49213	8:04	1:08:00	Net
Thursday	88881	49213	8:42	1:07:00	Net
Thursday	83792	83088	8:30	1:07:00	Net
Thursday	86847	83674	8:36	1:07:00	Net
Thursday	83969	83969	8:24	1:07:00	Net
Thursday	83969	83969	8:18	1:07:00	Net
Thursday	83969	83969	8:07	1:07:00	Net
Thursday	83969	83969	8:07	1:07:00	Net






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## Contact Log

- Integrated tracking of email, lobby (counter) and phone bank contacts
- Facilitates more effective resolution of customer service issues




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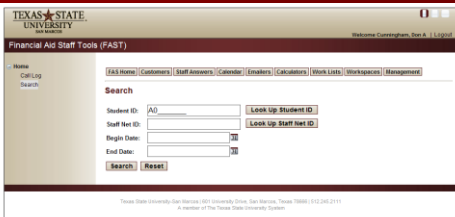
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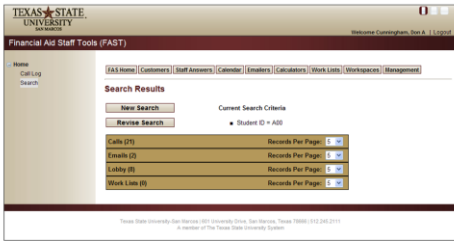
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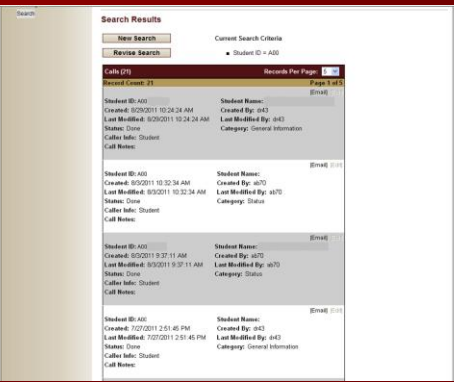
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## Auto-Emailers and Work Lists

- Improves service time
- Standardizes communications
- Automatically documents communication
- Streamlines workflows and allows escalation to supervisor




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[FAS Home](#) | [Customers](#) | [Answers](#) | [Find Student](#) | [Calendar](#) | [Emails](#) | [Calculators](#) | [Work Lists](#) | [Workspaces](#) | [Stats](#) | [Management](#)

### Select Emailer

Email Application: 148 City Email

- 148 City Email
- ADU Requests
- Agreement Letters
- APRIL Requests
- CMU 2714
- Federal and Graduate Support
- GV Requests
- Forms and Links**
- Loans Alternating
- Loans Federal
- Outside Scholarship
- TEACH Exit Counseling
- TEACH Grant Eligible
- TEACH Grant Waiver
- LifeLine
- Historical Check Releases
- Overseas Sender
- Overseas Loans
- Withdrawal - Actual
- Withdrawal - Simulation

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[FAS Home](#) | [Customers](#) | [Answers](#) | [Find Student](#) | [Calendar](#) | [Emails](#) | [Calculators](#) | [Work Lists](#) | [Workspaces](#) | [Stats](#) | [Management](#)

### Forms and Links

Student ID:  Pull Info

Student Email:  Student Name:

Message:

Attachments:

Select an Attachment:  Select a 2nd Attachment:

Select a 3rd Attachment:  Select a 4th Attachment:

Links:

Select a Link:

Select a 2nd Link:

Extra Message:

Send Email

\* Required Field

Select a Different Emailer  View Past Emails

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[FAS Home](#) | [Customers](#) | [Answers](#) | [Find Student](#) | [Calendar](#) | [Emails](#) | [Calculators](#) | [Work Lists](#) | [Workspaces](#) | [Stats](#) | [Management](#)

Student ID:  Pull Info

Student Email:  Student First Name:

Student Last Name:

Overseas:  Overseas  Datacollected  Select Fund Being Reduced  Select Fund Receiving E.P.

Total Net Amount: \$

Reason:  New TA  OTA Increase  New Scholarship  Scholarship Increase  Overaggregate  FAFSA Change  Other

The below section sends needed information to Reporting:

Fund(s) Being Reduced (needed for all emails):

Fund Code 1:	Net Amount 1:	Semester 1:
Fund Code 2:	Net Amount 2:	Semester 2:

Fund(s) Receiving E.P (only for datacollected):

Fund Code 1:	Net Amount 1:	Semester 1:
Fund Code 2:	Net Amount 2:	Semester 2:

\* Required Field

Save Email

Search for a previous email:

Student ID:

Search by

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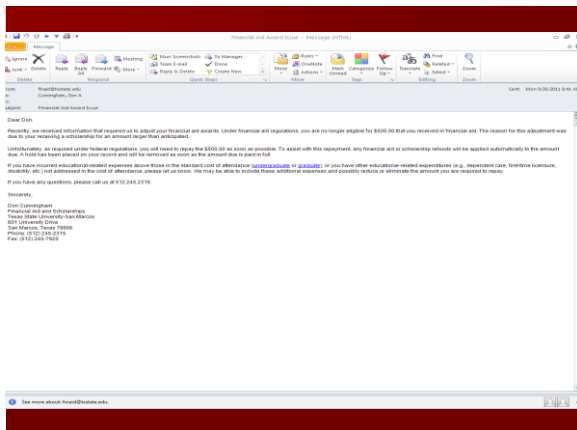
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## Staff Absences – Calendar System

- Automatic notification to all staff as to who is absent or late
- Reduces confusion as to who is available for service areas, special projects, etc.
- Easy for supervisors to search for past or planned absences
- Allows off-site financial aid staff to know who is available to assist them

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FAAS Home | Calendar | Email | Worklists | Users | Staff | Abs | Special | Lobby | Award Year | Status | User Role

### Calendar

Search By:

<< September 2011 >>

[Show All the Facts in September](#)

Day	Staff Member	Duration	Category	Comments	Action
9/19/2011	Sara Kollier	All Day	Vacation		
9/19/2011	Stephanie Lopez	All Day	Vacation		
9/19/2011	Cristi Jans	All Day	Vacation		
9/19/2011	Vicky Williams	All Day	Vacation		
9/19/2011	Jennifer Obenskans	All Day	Vacation		
9/19/2011	Elke Crow	All Day	Vacation		
9/19/2011	Jill Reed	All Day	Vacation	vacation	

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[FAS Home](#) | [Calendar](#) | [Email](#) | [Worklists](#) | [Users](#) | [Staff x3](#) | [Special](#) | [Lobby](#) | [Award Year](#) | [Stats](#) | [User Mode](#)

### Add Absence / Late

Staff Member:  Select  
 Duration:  All Day  Partial Day  Appointment  Workshop  
 Date:  September  Select Day  2011  
 Category:  Planned Vacation  Sick Day  Maternity  Parent  Late  Unreported / Emergency  Appointment / Workshop / Conference

Comments:

\*Required Field

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[FAS Home](#) | [Calendar](#) | [Email](#) | [Worklists](#) | [Users](#) | [Staff x3](#) | [Special](#) | [Lobby](#) | [Award Year](#) | [Stats](#) | [User Mode](#)

### Daily Update

#### Tuesday, September 20, 2011

Sara Bolmer	All Day
Edi-Care	All Day
Jessamine Chubberson	All Day
Chris Ellis	All Day
Peggy Pizarro	All Day
Kathryn Sells	Partial Day
Melissa Pardo	Out from 8:00 to 12:00
	Workshop
	Out from 2:30 to 4:30
Kira Miranda	Workshop
	Out from 2:30 to 4:30

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## Document Imaging System

- Larger staff demand on the front end (i.e., scanning, indexing, etc.)
- Allows for faster processing (i.e., verification, adjustments, appeal reviews, etc.)
- Faster resolution of customer service issues at the counter or over the phone




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Oracle Developer Forms Runtime - Web: Open - SASCAL  
File Edit Options Block Item Record Query Tools Help  
Apply Texas Scholarship App Form: SASCAL 8.5 (MC 2.0.0) (PROD)  
ID: [ ] Term: 001210 Fall 2011 Application Number: [ ]  
Financial Information | Extra Curricular Activities | Community Service | Awards/Distributions | Senior Courses | Employment | Questions | Essays  
Marital Status: Single  
Annual Income: 3000  
Spouse Occupation: [ ]  
Spouse Income: [ ]  
Presently Lives With: Both Parents  
Parent/Guardian: TEACHER/COACH Occupation: PLAINVIEW ISD Employer: [ ] Deceased: [ ] Income: 60000  
MOTHER: BANKER Occupation: WELLS FARGO Employer: [ ] Deceased: [ ] Income: 30000  
Funds for college saved by student: [ ]  
Funds for college saved by others: [ ]  
Projected parental support (annual): [ ]  
Student intends to complete a FAFSA: Yes [ ] No [ ]  
Scholarships or Grant Student Will Receive: [ ]  
Scholarships for Which Student Has Applied: Terry Foundation (2 letters REQUIRED LATER from finalists)

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Oracle Developer Forms Runtime - Web: Open - SASCAL  
File Edit Options Block Item Record Query Tools Help  
Apply Texas Scholarship App Form: SASCAL 8.5 (MC 2.0.0) (PROD)  
ID: [ ] Term: 001210 Fall 2011 Application Number: [ ]  
Financial Information | Extra Curricular Activities | Community Service | Awards/Distributions | Senior Courses | Employment | Questions | Essays  
Activities  
Hrs per Wk/Wks per Yr  
Position Description Elected Level Organization Name FR SO JR SR  
ACTIVITY ACT FOR CONTEST [ ] REGIONAL ONE ACT PLAY 15/08 15/10 15/18 15/20  
PARLIAMENTARIAN COMMUNITY SERVICE [ ] DISTRICT FUTURE TEACHERS OF AMER 2/02  
RECORDING SECRETARY COMMUNITY SERVICE [ ] DISTRICT FUTURE TEACHERS OF AMER 2/02  
REPRESENTATIVE HELP WITH SCHOOL FUNCTIONS [ ] DISTRICT STUDENT COUNCIL 2/02  
STATE QUALIFIER COMPETE IN CONTEST [ ] STATE BUSINESS PROFESSIONALS 15/12 15/12  
TEAM MEMBER PLAYED BASKETBALL [ ] DISTRICT BASKETBALL 15/20  
TEAM MEMBER PLAYED IN GOLF TOURNAMENTS [ ] DISTRICT GOLF TEAM 16/12 16/12  
TEAM MEMBER READ PROSE AND POETRY FOR CONTEST [ ] DISTRICT PROSE AND POETRY 5/6 5/6  
TEAM MEMBER PLAYED VOLLEYBALL [ ] DISTRICT VOLLEYBALL 15/15 15/15  
YOUTH MEMBER ATTEND YOUTH FUNCTIONS [ ] LOCAL TULLIA FIRST UNITED METHOD 3/02 3/02 3/02

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Oracle Developer Forms Runtime - Web: Open - SASCAL  
File Edit Options Block Item Record Query Tools Help  
Apply Texas Scholarship App Form: SASCAL 8.5 (MC 2.0.0) (PROD)  
ID: [ ] Term: 001210 Fall 2011 Application Number: [ ]  
Financial Information | Extra Curricular Activities | Community Service | Awards/Distributions | Senior Courses | Employment | Questions | Essays  
Essay Questions and Answers  
Print Essays  
Question/Answer: ESSAY B  
Choose an issue of importance to you... the issue could be personal, school related, local, national, or international in scope... and write an essay in which you explain the significance of that issue to yourself, your family, your community, or your generation.  
Hunger in America  
"Are you going to throw that away, there are starving children in Africa." We have all heard this phrase before when throwing away a food. Some 3 year a child people have told me this. Something we don't usually hear about in the starving people in the United States. Over the past few years I have come to  
Question/Answer: ESSAY C  
There may be personal information that you want considered as part of your admissions application. Write an essay describing that information. This might include exceptional facilities, challenges, or opportunities that have shaped or inspired your academic or academic credentials, personal responsibilities, exceptional achievements or talents, educational goals, or ways in which you might contribute to an institution committed to creating a diverse learning environment.  
See Response  
When the leaves start changing colors every person in Texas knows this means one thing, high school football season has begun. For most people this means going to local games every Friday night and cheering on the home team, for my family it means so much more. Football season means late nights, not just on Friday but every night. It means never getting to have alone time and most importantly it means scheduling our lives around practices, meetings, games, and angry parents. Yes my Dad was the head

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## Future Technology Objectives

- Implementing a call board system
- Online scoring of staff's customer service on phone calls
- Exploring methods of communicating with customers beyond email
- Online scoring of scholarship applications by scholarship review committees



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