

## **5. FINANCIAL AID OFFICE**

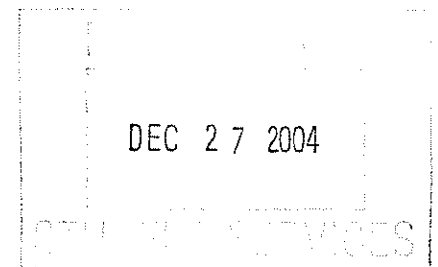
Maui Community College  
Student Services – **Financial Aid**

**Mission Statement: Please see Mission and Functional Statements attached**

(MCC mission statement and CAS standards)

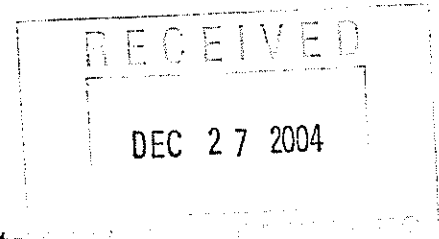
**Functional Statement: Please see Mission and Functional Statement attached**

(List functions utilizing current functions and CAS standards)



**Maui Community College  
Student Services**

**Financial Aid Office  
Mission and Functional Statements**



**Mission:**

The mission of the Maui Community College Financial Aid Office is to assist students in accessing higher education by minimizing economic barriers and by promoting financial literacy.

**Functional Statements:**

Provide high quality services, including financial aid counseling and awarding, to all financial aid students.

Distribute financial aid resources in an equitable manner that compliments institutional priorities.

Provide stewardship over Federal, State, institutional and external funds in compliance with regulations.

Maintain accurate records necessary to meet federal, state and institutional reporting requirements.

Develop and distribute policies and procedures to streamline the financial aid process for students and parents while meeting federal requirements.

Oversee the student employment process, including maintaining accurate records for the Federal Workstudy program.

Promote financial literacy.

Assist students in the transition from secondary to post-secondary education, as well as between institutions of post-secondary education. Assist re-entry students in the transition between period of non-enrollment to re-enrollment.

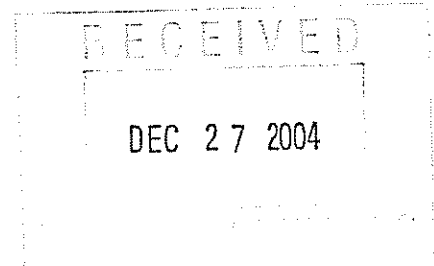
Pursue continued professional development opportunities to ensure staff knowledge of current regulatory policies.

Utilize technological initiatives to simplify and streamline the delivery of financial aid services.

Participate in campus meetings and committees to foster institutional communication and collaboration in servicing our students.

Provide financial aid outreach services to the Maui County community at large.

Maui Community College  
**Financial Aid**  
**Quantifiable Data**



A. Admissions & Records

FY 03

FY 04

**B. Financial Aid – Please see Financial Aid Quantifiable Data attached**

C. Counseling

D. Student Life

E. Student Housing

F. EOC

G. Student Support Services

H. Upward Bound

I. Kuina

J. Liko A'e

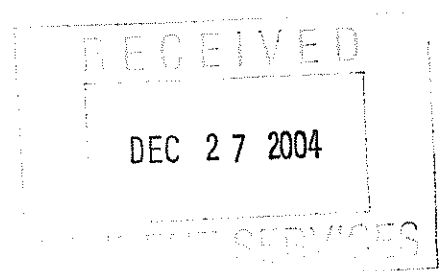
K. Halao A'o

Maui Community College  
Financial Aid Office  
Quantifiable Data

	FY 2002	FY 2003	FY 2004
Financial Aid Applications		1771	2516
# of Financial Aid recipients (unduplicated)	648	694	754
Pell	546	633	676
SEOG	192	209	127 *
HSIG	11	8	8
TWN	251	219	217
FWS	42	39	32
Perk	24	23	14
Shel	15	7	15
Sub Staff	176	185	303
Unsub Staff	51	50	204
PLUS	3	5	8
Dollar value of Financial Aid Awards	\$ 2,042,771.75	\$ 2,432,856.71	\$ 3,357,327.86
Pell	\$ 1,069,703.75	\$ 1,416,031.00	\$ 1,526,757.00
SEOG	\$ 46,625.00	\$ 54,018.00	\$ 57,350.00
HSIG	\$ 5,993.00	\$ 6,220.00	\$ 5,424.00
TWN	\$ 170,922.00	\$ 174,794.40	\$ 166,963.50
FWS	\$ 83,073.00	\$ 75,760.31	\$ 67,220.36 **
Perk	\$ 51,782.00	\$ 48,595.00	\$ 34,403.00
Shel	\$ 31,650.00	\$ 13,063.00	\$ 31,601.00
Sub Staff	\$ 418,790.00	\$ 464,291.00	\$ 771,254.00
Unsub Staff	\$ 151,233.00	\$ 157,384.00	\$ 668,473.00
PLUS	\$ 13,000.00	\$ 22,700.00	\$ 27,882.00
UHF Scholarship Awards	44	83	82
UHF Scholarship Dollar Value	\$ 33,750.00	\$ 51,475.00	\$ 55,028.00
Student Employees	200	185	164
Student Employee Payroll	\$ 444,230.22	\$ 469,282.43	\$ 403,552.99

\* Dollar amount SEOG increased; number of awards decreased  
FAO processes (sends out tracking letters) to all applicants, including students who are only applying to Liko A'e

\*\* Decrease in FWS FY04 due to \$5000 funds transferred and spent in SEOG and \$6645 carried over to FWS FY05  
Because FWS students did not expend their funds as projected



Maui Community College  
**Financial Aid**

**Assessment Reviews, Improvements and Modifications Implemented,  
Assessment of Improvements and Modifications**

- A. Admissions and Records
- B. Financial Aid – Please see Financial Aid Initiatives attached**
- C. Counseling
- D. Student Life
- E. Student Housing
- F. EOC
- G. Student Support Services
- H. Upward Bound
- I. Kuina
- J. Liko A'e
- K. Halao A'o

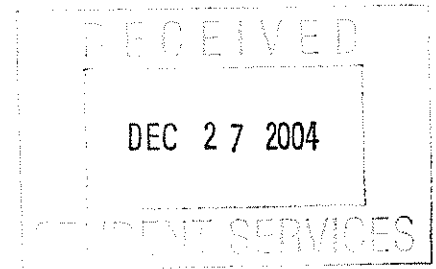
## Financial Aid Initiatives

Old Policy/Procedure	Issue	Resolution	Implementation
Minimal high school outreach by staff	Visibility in community was limited	As part of PacFAA participation began yearly workshops at high schools including Hana, Moloka'i & Lanai	Spring 2002
Financial aid funds not released until attendance verification form submitted	Funds not available to students to purchase books upfront. Penalizing 95% of the students for the action of others	Disburse aid 10 days prior to the start of the semester. <b>All CC's implemented this change.</b>	Fall 2002
Pell, Seog, Perkins and SHEL funds disbursed by paper check	Does not utilize Banner capability of having the institution capture the funds first and issue a single refund check to student. Long lines, manual process, duplication of work between FAO/BO.	Funds awarded through Banner system. Funds applied to students balance; residual check mailed to the student's home address. <b>All CC's implemented change</b>	Fall 2002
Required documents sent to student or required student to walk into office	Access for students; convenience	Create financial aid web page with forms available for download	Fall 2002
Financial Aid Satisfactory Academic Progress Policy	Policy is complicated, difficult to understand, difficult to explain and difficult to track	Revise policy to simplify policy. Move to 75% completion, 2.0 cum GPA and 150% timeframe	Fall 2002
UHF Scholarship funds disbursed via individual paper check	Time consuming, paper process. Lack of efficiency or relationship between UHF and the university	Disburse UHF scholarships through the Banner system. Residual funds sent via paper check to student's home. <b>Entire system implemented change.</b>	Fall 2003
Package initial financial aid award based on actual enrollment levels	Very time consuming, does not utilize Banner technology. Requires revisions up and down.	Initial financial aid award offer based on an assumption of full time enrollment. Banner process disburse aid based on actual enrollment.	Fall 2003
Required transcript evaluation before packaging	Time consuming process for counselors; penalized student for institutional process; Retention issues	Award student up front and give students one semester grace to provide transcript evaluation.	Fall 2003
Do not package loans for students on probation	Concerns that this limit to resources made it even more difficult for students to progress in classes	Award loans to students on probation	Fall 2003
Package only grant aid unless otherwise requested on data form	Student's unaware of additional resources available. Concerns regarding retention. Penalizing majority for concerns regarding a small number of recipients.	Offer all possible aid to students. Allow student to decide what to accept/decline	Fall 2003
Stafford Loan – Guarantee Only; paper Master Promissory Notes (MPN's) from office	Difficult tracking for staff; loan proceeds delayed; high office traffic	Moved to serialized print and guarantee process. Reduce paper MPN's issued by office. Reduced delivery time of loan proceeds	Fall 2003

Financial Aid disbursements of Pell, Seog and Perkins and SHEL loans were disbursed in two equal disbursements a semester.	Some students not having enough funds with first disbursement to clear balance and purchase books. Complicates the purge/billing process	Moved to a single disbursement per semester – utilize Banner's ability to track student balances and bill student's	Fall 2003
Required an Institutional Student Form for financial aid recipients	Not utilizing Banner capability. Information resides in the system. Redundant request of information. Increased paper usage and workload	No longer requiring ISF of every student applying for financial aid. Capturing data stored electronically on Banner.	0405 Award Year
Print each ISIR for review	Not utilizing Banner capability, increase printing and paper cost.	Will not print ISIRs for Financial Aid Applicants. Instead will use data stored in Banner	0405 Award Year
Requested paper academic transcripts for UHF Scholarship Application	Not utilizing Banner capability, increase workload for A&R; inconvenient for student	Researched student's academic eligibility in house. Provided copies of transcripts to committees for review.	Spring 2004
No formal default management plan	Stafford Loan Cohort Default Rates increasing. Unable to implement default management plan due to lack of staffing	Working with 1 <sup>st</sup> Student Financial to develop a tracking system that will capture loan date regardless of guarantor	Spring 2004
Stafford loan funds are received as individual loan checks for each student	Complicated paper process; confusion over multiple means of disbursing aid; outreach students have lag in receiving funds	Utilize Banner's capability of disbursing Stafford Loan funds via electronic funds transfer	Fall 2004
Stafford loan students need to sign hard copy of Master Promissory Note (MPN)	Not utilizing technology. Slows down receipt of loan funds due to mail time	Aligned lenders to maximize service to students. Student's will be able to sign MPN using e-signature technology	Fall 2004
Need based tuition waivers – no limit	Small number of students accessing waiver at large amounts; loss of revenue, Requires multiple revisions and tracking	Sought approval from the Acad Senate, Stu Gov't and Executive Committee to cap waiver at 13 credits	Fall 2004
No formal survey of office services	No hard data on which to base evaluation of service provided to financial aid recipients	Will send survey with student's award letter – reply envelope provided	Fall 2004
Lack of customer service surrounding document verification	Often inconvenient for students to provide documents required to process file.	Provide pre-addressed reply envelopes with each tracking and award letter	Fall 2004
No formal default management plan	Stafford Loan Cohort Default Rates increasing. Unable to implement default management plan due to lack of staffing	Applied for and received EDShare grant to fund a temporary position.	Hiring in process (Spring 2005)



Maui Community College  
**Financial Aid**  
**Assessment Surveys**



- A. Admissions and Records
- B. Financial Aid – Please see Financial Aid Survey, Survey Results attached, and Comments attached**
- C. Counseling
- D. Student Life
- E. EOC
- F. Student Support Services
- G. Upward Bound
- H. Kuina
- I. Liko A'e
- J. Halau A'o

# Maui Community College

## 2004-2005 Financial Aid Office Survey

We'd like to know how satisfied you are with our financial aid services. Please read the questions below, select the responses that best describe your experience, and return the completed form to us. **NOTE:** Several of the questions ask that you assign a grade to a particular service. Please use a standard grading system to respond to these questions.

**A = Excellent      B = Above Average      C = Average      D = Poor      F = Failure**

### I. PRINTED INFORMATION ABOUT FINANCIAL AID:

1. Did you receive any printed information about financial aid programs, policies, and application procedures?  
☐ Yes (continue with question 2)  
☐ No (skip to question 3)  
☐ Not sure (skip to question 3)
2. Please assign a grade to the usefulness of this information to you and/or your family. (Circle one)  
**A                  B                  C                  D                  F**

### II. TELEPHONE SERVICES:

3. During the past year, how many times have you or a family member telephoned the Financial Aid Office?  
☐ None (skip to question 10)                      ☐ Three (continue with question 4)  
☐ One (continue with question 4)                      ☐ Four or More (continue with question 4)  
☐ Two (continue with question 4)
4. Please indicate the reason(s) for your call(s). (Mark all that apply)  
☐ Check on application procedures  
☐ Check on status of aid request  
☐ Seek information on student employment  
☐ Seek information on Stafford/PLUS loan check  
☐ Request forms  
☐ Discuss award package or denial  
☐ Other (Please specify) \_\_\_\_\_
5. Have you had any difficulty getting through to the right person when you called the financial aid office?  
☐ Yes (continue with question 6)                      ☐ No (skip to question 7)
6. Please indicate the reason(s) for this difficulty. (Mark all that apply)  
☐ Persistent busy signals  
☐ Referred to the wrong person  
☐ Received recorded message and could not get through to staff member  
☐ On hold for too long  
☐ Phone was not answered
7. Please assign a grade to the **courteousness** of the person(s) you spoke with on the telephone. (Circle one)  
**A                  B                  C                  D                  F**
8. Please assign a grade to the **knowledge** of the person(s) you spoke with on the telephone. (Circle one)  
**A                  B                  C                  D                  F**
9. Please assign a grade to the **helpfulness** of the person you spoke with on the telephone. (Circle one)  
**A                  B                  C                  D                  F**

**CONTINUED ON BACK ....**

### III. WALK-IN SERVICES:

10. During the past year, how many times have you visited the financial aid office on a walk-in basis without a scheduled appointment?

- |  |   |
|--|---|
| <input type="checkbox"/> None (skip to question 16)      | <input type="checkbox"/> Three (continue with question 11)        |
| <input type="checkbox"/> One (continue with question 11) | <input type="checkbox"/> Four or More (continue with question 11) |
| <input type="checkbox"/> Two (continue with question 11) |   |

11. On average, how many minutes have you had to wait before you were helped?

- |  |   |
|--|---|
| <input type="checkbox"/> None                | <input type="checkbox"/> 5 – 15 minutes       |
| <input type="checkbox"/> Less than 5 minutes | <input type="checkbox"/> More than 15 minutes |

12. Please indicate all reasons for your visit(s). (Mark all that apply)

- ☐ Check on application procedures
- ☐ Check on status of aid request
- ☐ Seek information on student employment
- ☐ Request forms
- ☐ Discuss award package or denial
- ☐ Sign necessary forms

13. Please assign a grade to the **courteousness** of the person(s) with whom you spoke. (Circle one)

A                  B                  C                  D                  F

14. Please assign a grade to the **knowledge** of the person(s) you spoke. (Circle one)

A                  B                  C                  D                  F

15. Please assign a grade to the **helpfulness** of the person you received during this visit. (Circle one)

A                  B                  C                  D                  F

### IV. OVERALL EVALUATION OF FINANCIAL AID SERVICES:

16. Please assign a grade to the financial aid process as you have experienced it. (Circle one)

A                  B                  C                  D                  F

17. Please assign a grade to our financial aid policies as you understand them. (Circle one)

A                  B                  C                  D                  F

18. Please assign a grade to the financial aid personnel you have spoken to or met with. (Circle one)

A                  B                  C                  D                  F

19. Please assign an overall, final grade to our financial aid services. (Circle one)

A                  B                  C                  D                  F

20. How would you rate the overall services of the financial aid office in comparison to other campus administrative offices you have worked with (Admissions, Registration, Cashiering or Student Accounts, Academic or Personal Counseling, Placement, etc.)?

- |   |  |
|---|--|
| <input type="checkbox"/> Much better than most  | <input type="checkbox"/> Somewhat better than most |
| <input type="checkbox"/> About the same as most | <input type="checkbox"/> Somewhat worse than most  |

21. List any suggestions or comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Did you receive any printed information about financial aid programs, policies, and application procedures?

1	Yes	No	Not sure	Total
	308	21	23	352

Please assign a grade to the usefulness of this information to you and/or your family:

2	A	B	C	D	F	Total
	181	82	21		1	285

During the past year, how many times have you or a family member telephoned the Financial Aid Office?

3	None	One	Two	Three	Four or More	Total
	54	49	73	27	99	302

Please indicate the reason(s) for your call(s). (Mark all the apply)

4	App. Proced.	Status	Student Empl.	Stafford/PLUS	Request Forms	Award Package	Other...	Total
	175	226	25	51	49	107	25	658

Have you had any difficulty getting through to the right person when you called the financial aid office?

5	Yes	No	Total
	13	264	277

Please indicate the reason(s) for this difficulty. (Mark all that apply)

6	Busy Signals	Wrong Person	Recorded Mes.	On Hold too long	Phone not answered	Total
	2	6	3	3	3	17

Please assign a grade to the **courteousness** of the person(s) you spoke with on the telephone. (Circle One)

7	A	B	C	D	F	Total
	222	57	18	2		299

Please assign a grade to the **knowledge** of the person(s) you spoke with on the telephone. (Circle One)

8	A	B	C	D	F	Total
	199	69	21			289

Please assign a grade to the **helpfulness** of the person(s) you spoke with on the telephone. (Circle One)

9	A	B	C	D	F	Total
	223	49	18	2		292

During the past year, how many times have you visited the Financial Aid Office on a walk-in basis without a scheduled appointment?

10	None	One	Two	Three	Four or More	Total
	60	38	80	51	87	316

On Average, how many minutes have you had to wait before you were helped?

11	None	<5 min	5-15 min	>15 min	Total
	21	208	25	1	255

Please indicate all reasons for your visit(s). (Mark all the apply)

12	App/ Proced.	Status	Student Empl.	Request Forms	Award Package	Sign Forms	Total
	208	209	34	83	\$107.00	\$180.00	821

Please assign a grade to the **courteousness** of the person(s) with whom you spoke. (Circle One)

13	A	B	C	D	F	Total
	216	50	14	2		282

Please assign a grade to the **knowledge** of the person(s) with whom you spoke. (Circle One)

14	A	B	C	D	F	Total
	211	53	13	0		277

Please assign a grade to the **helpfulness** of the person(s) with whom you spoke. (Circle One)

15	A	B	C	D	F	Total
	216	44	12	2		274

Please assign a grade to the financial aid process as you have experienced it. (Circle One)

16	A	B	C	D	F	Total
	220	76	29	3	1	329

Please assign a grade to our financial aid policies as you understand them. (Circle One)

17	A	B	C	D	F	Total
	213	86	31	1		332

Please assign a grade to the financial aid personnel you have spoken to or met with. (Circle One)

18	A	B	C	D	F	Total
	250	57	21	3		328

Please assign an overall, final grade to our financial aid services. (Circle One)

19	A	B	C	D	F	Total
	240	76	16	1		334

How would you rate the overall services of the financial aid office in comparison to other campus administrative offices you have worked with?

20	Much better	About Same	Somewhat better	Somewhat worse	Total
	100	100	32	4	236

## Maui Community College 2004-2005 Financial Aid Office Survey

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### COMMENTS & SUGGESTIONS

1. There should be at least two people assisting people.
2. First time students are explained how financial aid works with lenders.
3. Suggestions are helpful to situations customers may not be aware of...
4. Thanks! ☺
5. Cathy is Great! ☺ The FAFSA was so confusing maybe every summer send out a reminder to returning students to Re-Fill out their FAFSA! Otherwise Cathy helped me out so much once I figured out that I had to re-file!
6. Thank you. Thank you. Thank you. It helps a lot. Aloha
7. Quick in and out, easy to deal with, nice ladies.
8. Cathy did a great job helping me out and was very courteous.
9. Delay in funds – more staffing?
10. Suggest better integration of Distance ED from other UH campuses.
11. Thanks to all staff for their patience through paper work and hard working each day! Mahalo Nui Loa.
12. Student workers were so helpful and kind.
13. MCC Fin Aid Dept does an excellent job.
14. People in the financial aid office know their stuff and are very helpful. I like that every time I went the person helping me had on a smile. \*\*Keep up the good work!  
Thank you!!☺

15. Applying for financial aid services was quick and easy. The service so far was very quick and efficient. This has been the quickest service so far that I received from your office or any other office on this campus.
16. I have not worked with any other financial aid office.
17. None. Thank you!
18. Don't change a thing!
19. Counseling dept needs more staff that are motivated and like working with people – pay them better or teach them about mentoring!
20. Keep doing what you're doing. The staff is so pleasant, and go out of their way to be helpful. They take the fear out of applying. ☺
21. Very Helpful. I am grateful for all the help. Thank you!
22. Thank you
23. This was a huge step for me and the MCC Fin Aid Office has made it enjoyable and easy. Thank you!
24. Very good! Keep up the good work
25. Keep up the good work!
26. Keep on this (me) don't assume.
27. N/A never experienced any other.
28. No other experience
29. My only problems were receiving things that I already did and getting a letter saying I never did it.
30. I need to ask about student employment opportunities...
31. Keep up the good work...

32. Thank you all! You guys meant so much to me. Mahalo nui loa.
33. Well, I guess the Financial Aid did pretty well.
34. Check real status of person's application – you sent me several unnecessary letters that I was told to disregard! (I think a total of 4 throw aways)
35. Always prompt and courteous
36. Not at this moment ☺
37. Both Cathy and Paula have been tremendously helpful! There were times when I didn't quite understand things and they were always happy to assist.
38. Keep up the good work.
39. Financial aid helps me a lot☺
40. Everyone was very helpful and know how to do their job.
41. Keep up the great job. You're making dreams come true!
42. Auntie Dodie is well experienced and it makes it so much faster and easier to do my financial aid☺
43. Mahalo Much! Your knowledge and helpfulness is/was greatly appreciated!
44. Please acknowledge Mary, Cathy, and Paula with their expertise. Staff for assistance of assuring me to fulfilling my educational goal.
45. This questionnaire would look much different if they're regarding the cashier/student records dept. Fin Aid needs to be consolidated for all UH campuses. Need much more info on local scholarships.
46. In my opinion, our Financial Aid advisor, Dodie Manaba she is the best in doing what she does. I really hope she continues to be Molokai's Financial advisor –our children of the future needs her expertise.



47. Financial aid staff are very helpful. Good job!!
48. At the MKK Ed Ctr office hours could be extended M thru Friday rather than M.W.F.
49. None. Very satisfied
50. They are really on it! Professional, Courteous
51. Happy w/services.
52. Very helpful.
53. The workers in the financial aid dept are the most knowledgeable and courteous people I have ever spoken to throughout the whole community college
54. I would like to Thank (Mona) with EOC for assisting me with all my financial aid forms and wonderful help. She was an "+"...
55. First time cannot say
56. When something is required of student notify them what it is.
57. Online loan counseling was slow difficult, and not user friendly, at the same time juvenile.
58. Good Job. Mahalo!
59. We receive our awards 10 days before school. By the time we order our books, we're 2-3 weeks into class. A little earlier would be better!
60. Thank you, for all your help!
61. Thank you so much for all your help.
62. All staff in the financial aid office have excellent people skills – show unlimited patience- go over and above – My thanks to them!
63. Keep up the good work!

64. The process should be more thoroughly explained from the beginning. To the counselors as well.
65. Information not WebTv compatible.
66. The staff at MCC made my college education possible, with their friendly, warm, and helpful support in regards to my financial loan and what things I had to do to secure my year. I will always be thankful for everything this staff has done and will do. Thank you
67. Excellent job! Mahalo Nui ☺
68. Don't let Dodi Manaba go. She is the best financial aid advisor overall!! She is very good at what she does and goes the extra mile for all.
69. Thank you for helping me.
70. The form letter that was sent out is confusing—it says that the applicant needs to do one thing or another thing—since we had done one we thought we did not have to do the other but we had to do both—very confusing!! It delayed our funds—
71. Everyone is always more than happy to help, and with a smile.
72. They do a great job!
73. I am very pleased and happy with all of the services that I received. Thank you.
74. Staff has always been kind and reassuring
75. Thanks for being helpful! ☺
76. MCC overall has been very helpful and supporting in my need for information.
77. Pertaining to question 20, only have worked with MCC offices. All very informative and helpful.
78. Mahalo for all your help and trying to help me ☺

79. Great staff
80. The services that were offered were great. I wouldn't change a thing! ☺
81. Thank you!
82. Auntie Dottie Manaba is always ready to help with anything I need.
83. Cathy was very helpful with all my questions and confusion as was the other people in the office.
84. No suggestions! ☺
85. Lacey has been very helpful.
86. Thank you for always being attentive, approachable, helpful, and patient. All of you!
87. More information about enrollment Kapiolani's ASL course and student financial aid would have been helpful. I didn't understand that when you held classes it was only for MCC courses – you folks were great to help me out. Thanks!
88. Keep up the good work.
89. Keep doing a great job!
90. I want to thank Lacey, Cathy, and Paula for helping me with information. They been really patient and polite. Its people like them that makes things easier. Mahalo plenty.
91. Thanks for helping me with the info on financial aid. I greatly appreciated your help!
92. More open hours better location and info when scholarships, grants, loans, and etc come out.

93. It would be helpful if the FAO could offer suggestions as to finding alternate funding for school, scholarship, etc.
94. The ladies are very helpful and polite and happy. Always very good customer service.
95. Calling the person if there is more papers to sign. Not waiting for them to call in.
96. Thanks for all the wonderful help! ☺
97. Your staff should be very proud—they are always eager to answer questions and provide the needed assistance. Thank you all for doing such great work!! ☺
98. When my paperwork wasn't done in a timely matter due to it be mailed or faxed. This was a problem.
99. Very confusing process—1<sup>st</sup> year signing up for Fin Aid, it took six months to get results—that normal?
100. Great service, mahalo!

No Comments  
15

N/A”  
7

“?”  
1

- 200510 Secured external support for maintaining an electronic lender list accessible from our financial aid homepage where students can directly link to their Loan Counseling Session and signing their Promissory Notes
- 200530 Created a Procedures Manual for Banner Procedures
- 200540 Gave students option of having financial aid directly deposited into their checking/savings acct rather than sent in the mail (ACH) through UH Central Cashiering Office  
Eliminated need for UH to process and mail a paper check and allows student to receive refund in less time.
- 200540 Worked in conjunction with Edfund to identify MCC's at risk population to target students for default prevention. Identified need to focus on 1<sup>st</sup> year students.
- 200540 Diverted 4 out of 24 students (Edfund cohort list) from defaulting on their loan by walking them through the deferment and forbearance process.
- 200540 Began taking minutes during weekly FAO meetings to document ongoing discussion to provide better services
- 200540 Revisited record retention requirements; required to retain 4 academic years rather than 5. Eliminated and shredded all files not needed to be archived. Double checked that students didn't re-enroll and receive aid before shredding files; also kept a log of files shredded for our information
- 200540 Moved around computers in the office to ensure speed and efficiency where needed (front/reception). Moved federal software programs and transferred data to computer with highest efficiency.
- 200540 Re-organized office duties so that FAO Director/Asst Director can monitor all incoming/outgoing transmissions between institution and USDOE and delegate duties as needed. Changed logging system to include ALL transmissions on one log rather than keeping multiple logs for transmissions to more clearly track and look for missing transactions (Pell originations/disbursements; EDE corrections, etc).
- 200540 Created master schedule in which various reports will be worked regularly (RORCALC to identify overawards; RPRAWDB to monitor disbursements; 1578/RPRAWDB to monitor FWS)
- 200540 Created a separate spreadsheet to monitor FWS using 1578 b/c ODS report isn't pulling correct info
- 200540 Cross trained staff members: Director/Asst. Director to be comfortable with all processes (from drawing down of isirs, to working suspense files, tracking ltrs, awarding, disbursing). Regular monitoring of withdrawals (loan exit, R2T4), monitoring FWS, monitoring overawards, monitoring disbursements, reconciling as we go – these duties will be appropriately delegated to staff (Summer 2005)
- 200540 Create master schedule to alert us of upcoming reporting deadlines (HSIG Perf Rpt, FISAP, etc) (Fall 2005)
- 200610 Improved loan processing efficiency resulting in a 95% increase in the amount of aid disbursed to students on the first day of fall disbursement (\$189,422 in 04-05; \$370,575 in 05-06)
- 200610 Started issuing financial aid award letters approximately six weeks earlier than 2004-05
- 200610 Implement an in-person counseling session with 1<sup>st</sup> year loan recipients.
- 200610 Plan annual FAO retreat to evaluate prior academic year practices and plan for upcoming academic year. Utilize results and comments from survey (Fall 2005)
- 200610 Begin pulling together information for Policies and Procedures Manual

8/18/05

200610 USC JDS report in conjunction with Less than halftime/complete w/d report created by Computing Center, as we discovered campus report wasn't always accurate. This will be monitored weekly rather and every two weeks (timely loan exiting and R2T4 calculation)

200610 Begin sending notifications (trk ltrs and perhaps notification that awd ltr complete) via email (Fall 2005)

200610 Begin sending out multiple trk ltrs to more proactively push students through the awarding process (Fall 2005)

Customer service satisfaction survey continued: results formulated: \_\_\_ overall rating on a 4.00 scale.

Secured external support for printing of office publications (exit forms, loan request forms)