Schools Best Electronic Practices

Pueblo Community College

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Pueblo Community College

- Public, 2 year college in southeastern Colorado
- Main campus and several additional sites up to 300 miles away
- Approximately 4,000 aid applicants
- Approximately 3,000 on financial aid including federal, state and institutional
- Verify selected applications only

PCC Financial Aid Staff

- Director
- Assistant Director
- Financial Aid Advisor
- Three clerical staff

Financial Aid Programs

- Federal
  - Pell Grant
  - FSEOG
  - Work Study
  - FFEL Loan Program
- State
  - Grant
  - Merit
  - Work Study
- Institutional
  - Scholarships
  - Grants
- College Foundation
  - Scholarships
- Total of 28 Funds

Financial Aid Dollars
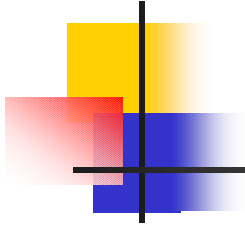
- Grants
  - $3.8 Million in Pell
  - $1.3 Million in State Grants
- Work Study
  - $168,000 Federal
  - $463,000 State
- Merit
  - $400,000 State and Institutional
- Loans
  - $1.8 Million Subsidized
  - $1.0 Million in unsubsidized or PLUS

Where to Start

- **Integrated Student Information System**
  - **Admissions and Records**
    - Enrollment
    - Grades including withdraws
    - Start and end dates of terms
    - High school diploma, GED or ATB
    - Instate Residency
    - Remedial courses
    - Eligible programs

Integrated Student Information System

Fiscal Operations

- Tuition and fees
- Bookstore and other charges
- Moving financial aid funds from awarding to disbursement
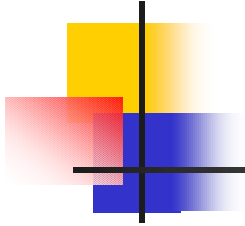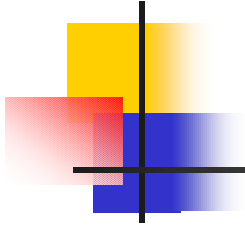- Fund reconciliation
- Reporting

What is Next?

- **Automated awarding**
  - Pell Grant
    - Student eligibility
    - Cost of Attendance
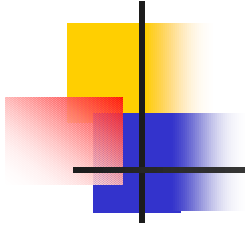   - Pell Chart
    - Enrollment

- **Automated Awarding**
  - Campus based, state and institutional funds
    - Based on packaging policy
    - Work is up front in setting up parameters
  - Advantages
    - Efficient
    - Accurate
    - Consistent
    - Non-judgmental

- **Electronic Data Exchange (Edconnect)**
  - Receive ISIRs; send and receive corrections
  - RFMS for Pell Grant
  - FISAP filing

Electronic Loan Process

- Loan application and certification to lender and guarantor via file transfer protocol (ftp)
  - Enter data only once on college's computer system
  - Demographic data originates from college admission file
 - Edits built in for accuracy
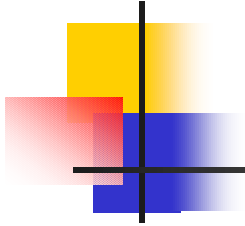
- **Electronic Loan Process**
  - Changes to the loan application can be done by the college on secure web site
  - Guaranteed loans are held for "Just In Time" disbursement
  - Disbursements to the college via electronic funds transfer (eft)
  - Electronic check of students' eligibility prior to disbursement

Using PC Technology

- Office forms
  - Student Information Form, Verification Worksheet, Professional Judgment, Additional Loan Form, etc
  - Developed in the office on Microsoft Word
  - Stored on network drive accessible to all staff; printed as needed
  - Sent to additional sites via email attachment
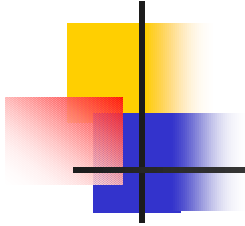
- **PCC Foundation Scholarship**
  - Multiple donors (scholarships) in one application
  - Using Microsoft Access to record and organize the data
  - Stored on network drive for access by more than one staff person

Managing the Paper

- **Document Imaging**
  - Definition-Electronic storage, processing, retrieval, routing, and archiving of documents.
  - All student documents
  - Objective-Access to every student financial aid file, by every staff person, at all times.

Document Imaging

- Current Process
    - Date stamp the document and log it on the computer as received
    - Image and index the document by SSN, academic year and document name
    - Run computer program from Student Information System for a list of complete files
    - Verify and/or set up the file for automatic awarding based on computer data and imaged documents

Document Imaging

- Advantages
  - Improved document management and retrieval
  - Improved service to students
  - Office is uncluttered and more professional looking

Technology for Student Use

- **Student computers with internet access**
  - FAFSA
  - Selective Service
  - Loan Counseling
  - Scholarship Searches
  - PCC web site

Student Computers

- **Advantages**
  - Assistance from knowledgeable staff
  - Access for those who may not have computers
  - Timely and accurate information
    - EFCs in August
    - Loan counseling on demand
  - Duplicate service at additional sites
  - More student knowledge and control of their financial aid
 - Educating students on use of computers and the internet

How do we do it?

- **Unlimited funds? No!**
  - Share costs as part of Community Colleges of Colorado
  - Trickle-down computers for student access
  - Free Department of Education software
  - Research to document that the technology is cheaper than labor
  - Illustrate how the technology improves service to students

How do we do it?

- Hire only computer techs for staff? No.
  - Free available training
    - College courses
    - Community Education courses
    - Computer services trainers
    - Share knowledge between staff
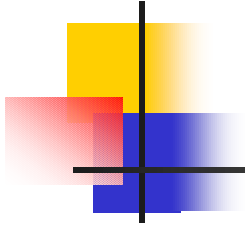   - Electronic Access Conferences
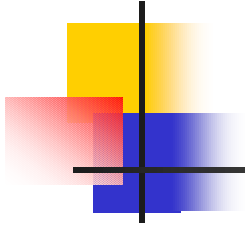
- **Make friends with the college computer personnel**
  - Become knowledgeable
  - Trouble-shoot what you can
  - Respect their time and abilities
  - Say thank-you

Where do we want to go?

- **Electronic Work Study Timesheets**
  - Access from any college computer
  - More efficient than paper
  - More accurate than paper

- Batch letters directly from an electronic file to document imaging
  - Award Letters; Satisfactory Progress Letters; Electronic Work Study Timesheets
  - Use less paper
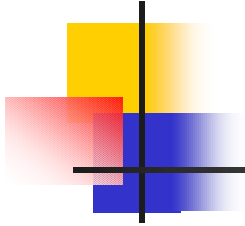 - More efficient
  - Better use of staff time

What Else?

- Expand the use of internet for student access to their financial aid information
  - Currently, students have access to their award notices, grades, financial bill and class registration
  - Need to add information concerning the documents needed to complete their financial aid file
  - Direct access to the forms needed as well as scholarship application forms

It is my goal to use technology for the repetitive tasks and to use staff to work with people.

Questions?

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