



Traveling Through

Uncharted Territory

SWASFAA | TASFAA
Conference 2023

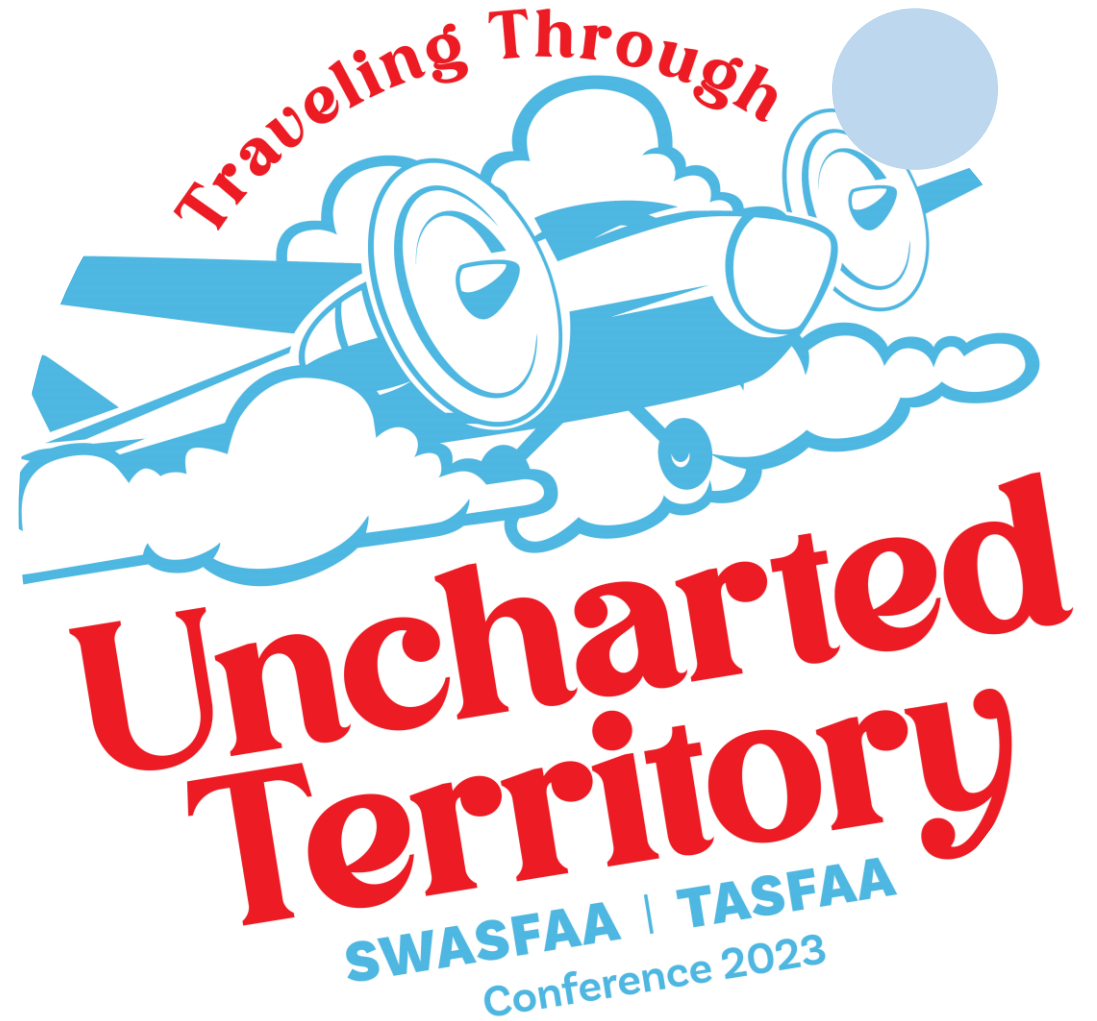


All For One Stop! One Stop For All!

*Lessons Learned by the Financial Aid Office
During a One Stop Implementation
(and some Ted Lasso wisdom)*

Agenda

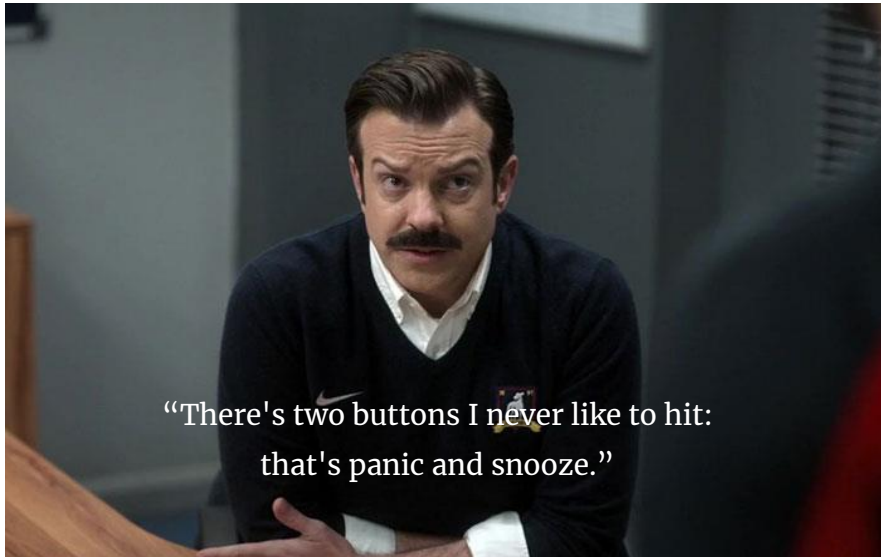
- Background
- Preparation
- Working Together
- Post-Launch
- Notable Successes
- In Progress



Background



Decision and Timeline



- **March 2020**
 - Visited One Stops
 - World Shut Down (COVID)
- **October 2020**
 - Staff notified of move to AOS
- **November 2020**
 - Integrated Student Services Professionals virtual conference
- **March 2021**
 - Hired Director
 - Meetings with each office
- **July 2021**
 - Logistics Meeting with Partner Offices
- **September – December 2021**
 - AOS staff rotate through shadowing and training with each office
- **October 2021**
 - AOS leadership relinquish former duties
- **Dec 2021**
 - Staff moved into new shared space
 - Soft opening
- **January 2022 - Launch!**

Aggie One Stop Model

- Provides student-facing customer service and advising for:
 - Admissions application process
 - Scholarships and financial aid
 - Veteran education benefits
 - Billing and payments (bursar)
 - Registrar
- Service channels
 - Phone
 - Email
 - Walk-in

Preparing for Opening





Organization Changes

- Twenty FAID staff were moved to AOS
- Changes to Org Chart
- Changes were made over time before and after AOS launch



Review and Redistribution of Duties

- FAID staff reassigned to Aggie One Stop
 - Phone Advisors
 - Walk-in Advisors
 - Assistant Director over phones
 - Associate Director
- What goes to Aggie One Stop (AOS), what stays in Scholarships & Financial Aid (FAID)
- What in FAID needed to move to others?
 - Spreadsheet
 - task, team, current owner, move to, notes, training began, training complete, handover date
- Balance customer service with compliance risk

Assessment and Reorganization of Access

- Created new Banner groups
- View/query vs edit access
- Assessed access to COD, FAA, NSLDS, HelmNet, Elm, etc.
- Secure Access Form for onboarding and exiting

Process Modifications

- Improved notes posted during automated and manual processes
- COA and Aid Adjustments
- Emergency Aid

Standard Processing Times

* Business Days		Peak* Peak Dates		Non Peak* Non Peak Dates		Frequency
What is this?						
Non Current to Current	Review new ISIR transactions trying to load on a locked RNANA record	2	December - May	1	June - November	Runs every day
Outside Scholarship Check Imaging Received Date to Validation	Scholarship checks received by Team P, scanned into perceptiv content, prepared for deposit, and validated to go to OMEGA	2	July-September December-January	1	October-November February-May	
Outside Scholarship Check- OMEGA Processing	Team Scholar processing checks through OMEGA	4	July-September January	2	October-December February-June	
Overawards	Review students' aid packages to determine what adjustments need to be made in order to resolve the overaward	3	May - September January	2	October - December February - May	Runs every day
Phone Messages Received Date to Response Date	Answer work related phone calls to your phone number	2	varies	1	varies	
Portal Docs Received by SFAID to Imaging	Review of all documents submitted through the portal	3	November - January July - August	1	February - June September - November	
Processing Withdrawals Return of TIV, Returning State Aid	Processing time includes calculations, first review, return of funds, and COD check for completion	20	just prior to 60% date of term/ during All F timeframe	7	remainder of the semester	Pwr_faaid_withdrawal reports run twice weekly with one report producing on Monday, capturing the prior Thursday-Sunday, and a second producing on Thursday, capturing the prior Monday-Wednesday
scholarships@tamu.edu Received Date to Response Date	Answer emails from external customers (prospective students, current students, former students, donors, etc) in regards to fellowship, scholarship, and tuition waiver questions	2	January-March August-September	1	April-July October-December	
SFAIDTeamS Emails Received Date to Response Date	Answer internal emails in regards to scholarship, fellowship, and tuition waiver questions	2	June-September	1	October-May	

Service Level Agreements

Category	Responsibilities	Service Provider			
		AOS Tier 1	AOS Tier 2	AOS Tier 3	Home Office
Applications	Advise on how to apply, eligibility, paperwork required, deadlines/timelines, and troubleshooting account issues	x	x	x	
	Advise on completing applications and eligibility (FAFSA, TASFA, ISFAA, TAGG, Scholarship apps, PLUS app, ETFL and STL, Alt loans etc)	x	x	x	
	Process and troubleshoot in depth issues				x
Eligibility	Advise on different funding sources (grants, scholarships, loans, work study, student employment, non-res tuition waiver for competitive scholarship recipients), when awarding takes place and renewability of funds	x	x	x	
	Advise on COA, SAP evaluation/appeal processes, Courses that Count, Verification in CL {including setting up accounts}, Q drops, Withdrawals (R2T4), PJs in CL, Dependency Override, scheduling appts in SWAN, completing prom notes and counseling on studentaid.gov, nonres waivers, staff tuition assistance, COA increase form, C flag resolution, emergency aid application	x	x	x	
	Schedule appointments in SWAN or direct to SWAN for students when needed	x	x	x	
	Outreach to students with registration holds and students at risk of hard drop	x	x	x	
	Identify students that are eligible for a late payment fee waiver	x	x	x	
	Maintain spreadsheet of students NOT to hard drop	x	x	x	
	Read, interpret, and analyze billing account activity- FAID related	x	x	x	
	Process, award and troubleshoot in depth issues				x
Documentation	Collect all paperwork that cannot be uploaded in the portal	x	x	x	
	Answer questions and direct students on process to submit Valedictorian Certificates- Texas Education Agency Highest Ranking High School Graduate Declaration document for HRG exemption (via portal or scholarships@tamu.edu)	x	x	x	
	Answer questions and direct students on process to submit Scholarship deferment/reinstatement/academic scholarship education abroad stipend request form (via portal or scholarships@tamu.edu)	x	x	x	

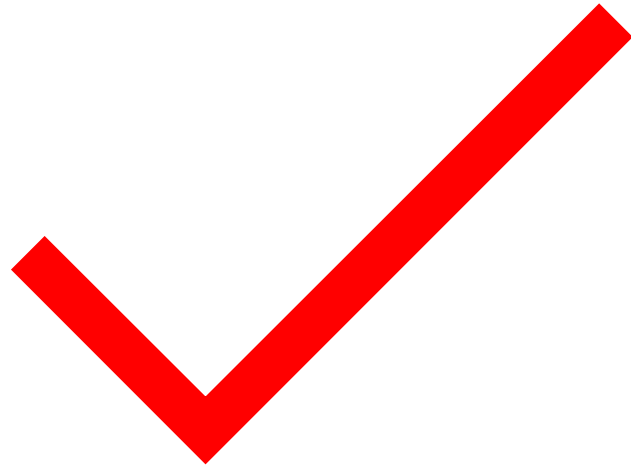
- One for each Partner Office
- Defines responsibilities and access
- Guides training

Training Pre-Launch

	Week of	Cohort 1	Cohort 2
Phase 1	6-Sep	SFAID/SBS shadowing	Online training assignments
	13-Sep	Online training assignments	SFAID/SBS shadowing
	20-Sep	REGI/ADMI shadowing	Online training assignments
	27-Sep	Online training assignments	REGI/ADMI shadowing
Phase 2	4-Oct	SFAID training/shadowing/hands on	Online training assignments or emails
	11-Oct	Online training assignments or emails	SFAID training/shadowing/hands on
	18-Oct	SBS training/shadowing/hands on	Online training assignments or emails
	25-Oct	Online training assignments or emails	SBS training/shadowing/hands on
	1-Nov	ADMI training/shadowing/hands on	Online training assignments or emails
	8-Nov	Online training assignments or emails	ADMI training/shadowing/hands on
	15-Nov	REGI training/shadowing/hands on	Online training assignments or emails
	22-Nov	TBD	TBD
	29-Nov	Online training assignments or emails	REGI training/shadowing/hands on
Phase 3	6-Dec	AOS Specific Training	AOS Specific Training
	13-Dec	AOS Specific Training	AOS Specific Training
	20-Dec	AOS Specific Training	AOS Specific Training

	Week of	Admissions	Registrar	SBS	SFAID	Online Training/Emails	AOS Training
Phase 1	9/6 - 9/8				Cohort 1	Cohort 2	
	9/8 - 9/10			Cohort 1		Cohort 2	
	9/13 - 9/15				Cohort 2	Cohort 1	
	9/15 - 9/17			Cohort 2		Cohort 1	
	9/20 - 9/22		Cohort 1			Cohort 2	
	9/22 - 9/24	Cohort 1				Cohort 2	
	9/27 - 9/29		Cohort 2			Cohort 1	
	9/29 - 10/1	Cohort 2				Cohort 1	
Phase 2	4-Oct				Cohort 1	Cohort 2	
	11-Oct				Cohort 2	Cohort 1	
	18-Oct			Cohort 1		Cohort 2	
	25-Oct			Cohort 2		Cohort 1	
	1-Nov	Cohort 1				Cohort 2	
	8-Nov	Cohort 2				Cohort 1	
	15-Nov		Cohort 1			Cohort 2	
	22-Nov	TBD - Short Week - Thanksgiving					
	29-Nov		Cohort 2			Cohort 1	
	6-Dec						All
Phase 3	13-Dec						All
	20-Dec						All

Biscuits with the Boss



Working Together





SFAID Responsibilities

- Awarding
 - Reports
 - Emergency funding
- Processing
 - Grants, loans, scholarship, work study, and veteran education benefits
- Professional judgment
 - Appointments, decisions and processing
- Satisfactory Academic Progress
 - Appointments, decisions, and processing
- Email communications

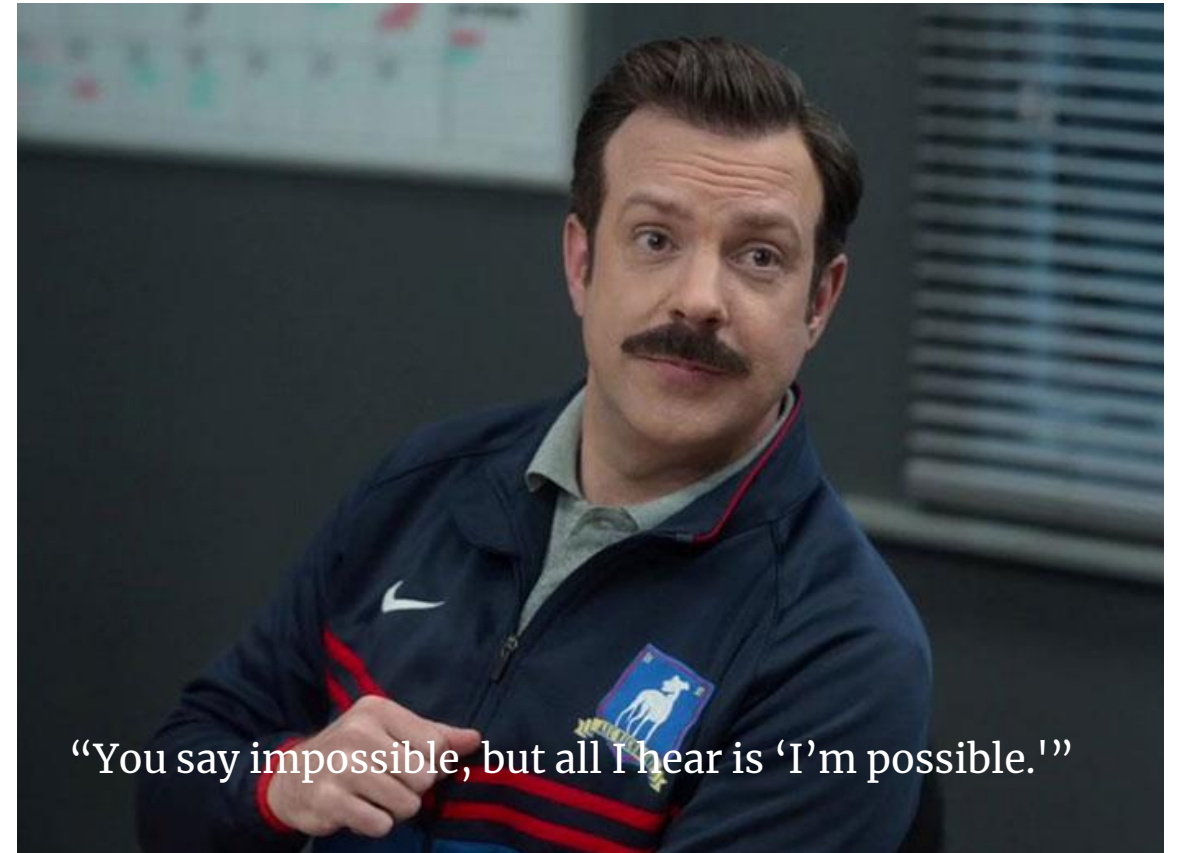


AOS Responsibilities

- Advising and customer service
 - Financial aid, scholarships, and veteran education benefits
 - Walk-in
 - Phone
 - Email
- Reoffer loans
- Accept documents
- Schedule appointments with FAID
 - SAP appeals and professional judgment reviews

Resolving Issues

- Tickets to Partner Offices
 - Customer Relationship Management System (CRM)
 - Account updates, complex research, escalations
 - Clean hand-off
 - Flag for training opportunity
- Liaisons assigned within both offices



Post-Launch Period





Communication

- Updates communicated between leadership and dedicated liaisons only
- Bi-weekly meeting with AOS and Partner Offices
- AOS included in relevant meetings
 - Cross-functional
 - Enrollment services and admission coordination
- AOS is sent a copy of all FAID related emails to students

Training



- New Hires
 - Rotate through training for each partner office (PO)
 - Some POs conduct their training, AOS conducts some
 - Training on customer service scenarios within AOS
 - Shadowing period after training
- Ongoing
 - Weekly closure Thursday mornings for training
 - “Just in time” training
 - AOS leadership attend weekly FAID trainings
- Retreats
 - Annual AOS staff training retreat
 - AOS leadership strategic planning retreats



Peak Assistance

- FAID assists with emails during the start of the Fall and Spring semesters
- Occasionally assist with walk-ins

Success and Progress



Notable Successes

- Holistic advising, no run-around
- AOS identifies problems that cross departments
- Improve publications and website
 - Group information by what makes sense, not by office
- FAID can focus on processing and compliance
- Eventual decrease in total calls and emails
- Creating future leaders in enrollment services
- Social media

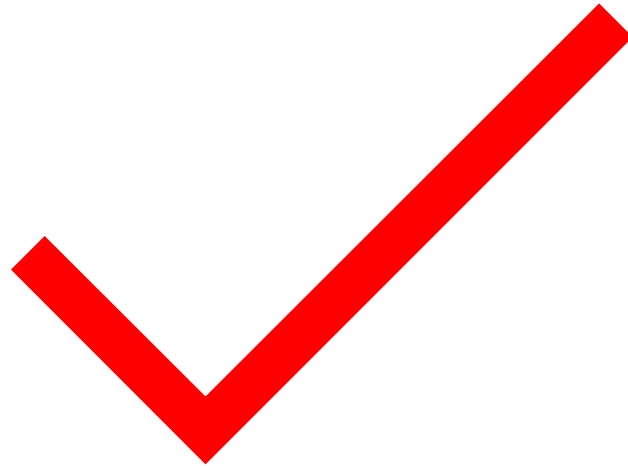
In Progress



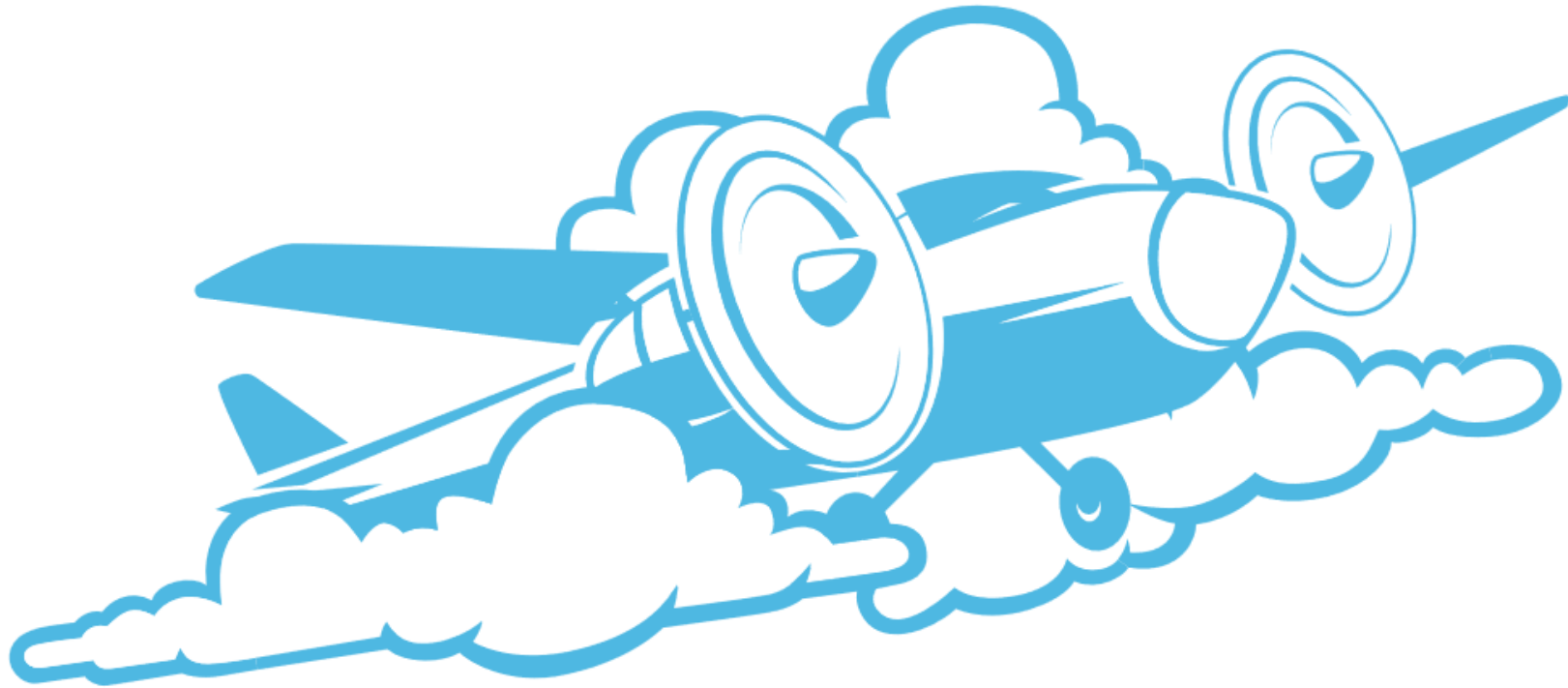
In Progress

- Working in different systems (email, CRM)
- Website
- Cohesive email communications and publications
- Financial Wellness

Embracing Change



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Thank you!