Financial Aid Processing Analysis Report and Solution Proposal

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Overview

Essential to students enrolling in classes is the availability of funding, in particular federal aid with processing of the Free Application for Federal Student Aid (FAFSA) being the critical link to enable students to matriculate knowing how (or if) their expenses will be covered by federal funds. Therefore, one of the paramount challenges of any FA Office is to process aid applications efficiently with increasing regulatory accountability yet providing the applicant with as simple, quick, and satisfying customer experience as possible amid the regulatory complexity.

This work presents an analysis of financial aid processing at Barton and an improvement proposal.

Analysis of Barton FA Processing | Enrollment & Revenue Impacts

In analyzing the aid processing cycle, the following challenges are of note:

- Low FAFSA application completion rates (aqua highlighted column A-1) – Barton's FA Office has noted the total percentage of applications getting through the entire verification process to completion process is low suggesting some applicants may "stop out" of the complicated requirements. (See aqua highlighted column A-1.)

- Increase in average FAFSA processing time in weeks -- As well, the time to move the applications from "received" to "completed" has increased in length. (See yellow highlighted column A-2.)

- Increasing complexity of federal regulations has greatly impacted FAFSA processing—The Higher Education Opportunity Act of 2008, reauthorizing the HEA brought about changes increasing regulatory burden the impact of which appears to be supported by a trend change beginning after the 11-12 aid year. (Note: 11-12 has consistently been the pivotal data shift marker for other KPI's as well.)

A-1: Barton FAO data on FAFSA Processing

Aid Year	# of FAFSA's	# of FAFSA's Awarded	% of FAFSA's Awarded	# of FAFSA's Awarded Pell	# Verified	% Verified Selected by CPS / Barton	Average Time to Process
15-16	4402	1500	34%	1115	2539	84% / 16%	13 weeks
14-15	4689	1543	33%	1399	2098	78% / 22%	11 weeks
13-14	4692	1571	33%	1212	2495	84% / 16%	13 weeks
12-13	4699	1626	35%	1278	2273	80% / 20%	12 weeks
11-12	3925	1640	42%	1281	2107	82% / 18%	9 weeks
10-11	3671	1584	43%	1241	2193	87% / 13%	7 weeks

- Despite increased efforts in connecting with students to complete and/or submit required documentation, the process bottleneck lies with the student's responsibility. Processing data stats routinely reviewed has consistently shown where the FA staff have control, processing is timely; process constraints lie with applicants. (See A.2)

- Adding staff will not improve processing time and would ultimately be less cost effective.

A.2 – Barton Processing Comparison Data

Office of Financial Aid - Barton Community College

Processing Stats -

Aid Year as of 04/11	10-11	11-12	12-13	13-14	14-15	15-16	16-17			Differential 1516 vs 1617
ISIR's Received	979	14	1307	1370	1435	1291	1277			-14
Files Awarded	228	n/a	40	n/a	n/a	n/a	134			n/a
Files Ready to Review	n/a	n/a	n/a	n/a	n/a	n/a	13			n/a
Files Waiting on Student	n/a	n/a	n/a	n/a	n/a	1	809			808
Files Ready to Award	0	0	0	0	0	0	5			n/a
Files Ineligible	222	n/a	72	113	202	45	255			210
Aid Year as of 05/03	10-11	11-12	12-13	13-14	14-15	15-16	16-17			Differential 1516 vs 1617
ISIR's Received	1226	1134	1658	1821	1727	1644	1556			-88
Files Awarded	310	n/a	91	9	n/a	32	193			161
Files Ready to Review	n/a	n/a	n/a	n/a	n/a	n/a	18			n/a
Files Waiting on Student	n/a	n/a	n/a	n/a	n/a	4	1133			1129
Files Ready to Award	0	0	0	0	0	0	11			n/a
Files Ineligible	352	98	188	173	236	70	142			72
Aid Year as of 06/16	10-11	11-12	12-13	13-14	14-15	15-16	16-17			Differential 1516 vs 1617
ISIR's Received	1663	1664	2188	2395	2219	2167	2103			-64
Files Awarded	504	272	320	264	338	283	368			85
Files Waiting on Student	n/a	n/a	n/a	n/a	n/a	7	1358			1351
Files Ready to Award	0	0	0	0	0	0	2			n/a
Files Ineligible	626	243	404	374	335	119	291			172

- Paper-intensive process – The problem only gets worse when more clarification is needed to process a FAFSA due to increased regulatory burden.

- Increase of 32 forms or 34% from 11-12 to 16-17 (See A.3)

A.3 Chart Showing Number of Verification Forms in Barton's Forms Bank

Aid Year	# of Verification Forms
11-12	61
12-13	66
13-14	82
14-15	89
15-16	91
16-17	93

- High rate of incomplete forms or forms submitted with errors necessitating back and forth handling of documents -- Currently, all verification forms are "paper" essentially. Requirements to students are posted electronically with links to forms to be printed, completed, and submitted back to the FA Office. The forms are subject to completion-error based upon the applicant's understanding of the form. Recently, the FA Helpdesk whose responsibility is to intercept and return inaccurate or incomplete in-coming forms began logging returned forms. The number captured below only represents what the FA Helpdesk has logged and not what the FA Officers return once they do a closer review of the form.

  - ✓ Logged <u>286</u> returned forms to students for 16-17

- Students are challenged with inconvenient delivery of documents to the FA Office – Another constraint for applicants is delivery of the document to the FA Office. Barton's FA Office has an institutional policy not to accept documents through FAX or email as these are not secure delivery mediums, as well as creating other complications if fax machines are not working or the email owner is out of the office when a document is sent, etc. MappingXpress (MX), an electronic upload mechanism, has worked well enough to accommodate a secure way for applicants to upload documents to a location centrally-accessible to staff. However, MX is not an option for those students without document-scanning capability. This leaves two options for students – mailing or hand-delivery of documents.

  - ✓ No fax allowed
  - ✓ No Email delivery allowed
  - ✓ Secure electronic upload but student must be able to scan document
  - ✓ Students must hand-deliver documents to the FA Office or mail them through the U.S. Postal Service

- Communicating with students is challenging—Even the initial communication of "next steps" and follow-up reminders of missing documents is has become a complicated process by which to connect with students to move the process along. Several years ago, Barton's FA Office instituted a process by which upon receipt of an applicant's FAFSA information, the FA Helpdesk would call the student to let them know to monitor their email for further instructions. This practice goes long way above beyond what is required and anecdotal evidence suggests this has been nominally effective.

  - ✓ Students don't read their email and/or take next action steps.
  - ✓ Students prefer to receive text messages.
  - ✓ Students prefer to complete/sign forms electronically.
  - ✓ Students prefer to snap pictures of documents rather than copy or scan documents.
  - ✓ As of end of December 2016 for 16-17, Barton FAO logged 7604 emails requests for documentation; logged 1059 phone messages left for students.
  - ✓ The FAO rarely knows if communications sent are even opened or read by students.

- Students increasingly want to e-Sign documents -- Barton's FA Office is encountering more applicants and their parents who want the ease and convenience of e-Signing electronic documents which can be a liability unless all elements of the e-Sign regulations are met. Some

of these same individuals have gone through mortgage approval or some other document-intensive, highly regulated process completely electronically and remotely.

- Results in poor student experience and increased number of touch points with FA Office – All of the challenges identified contribute to an applicant's perception of an antiquated, lumbering procedure that is giving them "the runaround".

- Trickle down effects include:

  - ✓ Students delaying enrollment to a subsequent cycle or not enrolling at all or with another school -- When a student has applied late or there are delays in awarding resulting in a student's aid is not in place by the payment drop date of a term or session, commonly the student is advised to drop their classes and re-enroll in the subsequent enrollment cycle if they cannot pay "out of pocket". With processing and awarding now taking up to 12 weeks, even a second 9-week session has passed by the time the student knows if they will be able to afford classes.

  - ✓ Students signing up for the payment plan while waiting for aid to be awarded and when not eligible for aid, may then stop out or leave the school with possible accounts receivable and/or lower student outcomes/completion rates – Even when students are able to sign up for the payment plan which buys some processing time, the student might not be able to make the payments or might find out later they are not eligible for aid or even as much as they thought. These situations leave the students in a worse situation than if they had just dropped the classes and resulting in additional account receivables to collect by Barton.

Promising Solution | Campus Logic

In reviewing solutions to the identified issues, Barton's FA Office has been comprehensively reviewing the functionalities of the Campus Logic product. The following features of the product are appealing and target Barton's most critical constraints in processing financial aid:

- Provides editable electronic forms to students—Electronic forms would move the process from paper-based to online.

- Pre-fills existing information into forms – Obvious, available information (inclusion of student in household information, for example) would pre-populate into the form eliminating the need for students to enter this information.

- Meets all eSignature requirements accommodating e-Sign ability – Students and parents may e-Sign documents meeting all regulatory requirements, eliminating the need to print, sign, re-scan, and submit documents.

- Provides mobile device capability (e.g. smart phone, tablet, laptop, etc.) – Students and parents can access and complete web-based forms through any mobile device as well as traditional PC.

- Includes skip-logic built into electronic forms based upon applicant-provided FAFSA information -- To capture all required information, most verification forms are all-inclusive. Campus-logic automatically customizes the verification form so the student only answers questions pertinent to them and their information.

- Combines common information from multiple documents into one form decreasing steps for students – Most verification forms have overlapping questions. Again, what is asked from the student

- Guides student towards correct answers through smart logic – As the student is completing the form, if they veer towards and answer that is inconsistent with existing information or is illogical, they are prompted to reconsider or provided with other guidance.

- Provides students embedded links to websites where 3rd-party document can be obtained (e.g. IRS, Selective Service, etc.) – Some documentation must be provided by a 3rd-party (e.g. IRS Tax Return Transcript, Selective Service Registration, etc.) Usually, these can be requested online through the 3rd-party website. For these requirements, an explanation is provided to the student with the accompanying link.

- Automates workflows between student and staff actions – When certain actions are taken, Campus Logic will initiate a trigger for the next step to occur. For example, when a student has submitted all required documents, the student's application is automatically placed in a queue for staff to review. Another example is when a requirement is placed on the student's account by staff, the student is automatically sent a text and/or email that they have an action step to take.

- Ensures secure electronic upload – Campus Logic delivers government grade PII security. This is especially important since the processing of federal financial aid involves using information ripe for identity theft (e.g. SSN, DOB, etc.)

- Auto-triggers communication to students letting them know receipt of requirements and next steps upon submissions of documents – Campus Logic reassures the student that the document was received and manages their expectations regarding what to expect next and when.

- Auto- notifies through text and/or email reminders to students of missing requirements – Currently, reminding students of missing requirements is a manual process, kicked off by staff. During peak intake times, this step can get missed.

- Logs student access to communication – Currently, the FA Office does not know if a student accesses an email message that is sent. Campus Logic records student access to communications.

- Enables staff to comment within the program to students – Currently, to communicate with a student requires accessing email accounts. Campus Logic has the ability for staff to send a communication within the program when they are working on a certain task. For example, if a review of a document shows the student uploaded a copy of their driver's license instead of their SSN, staff can "reject" the document, log the correct requirement, and send notification with personal explanation to the student all without accessing their email.

- Captures staff comments to students in central location – Rather than staff communications being archived in individual email accounts or on various forms in Banner, all communications are captured within a central location in Campus Logic which makes communicating with the more efficient since staff can view the previous communication trail.

- Compiles communication log with student including when student accesses messages – On the compiled communication log in Campus Logic, staff can see if a student has accessed a communication pushed to the student, enabling a better response to the student's questions.

- Syncs information with Banner so other college departments have same information access – Data and information syncs between Campus Logic and Banner alleviating the need for staff from other departments to access the Banner forms they are accustomed to in order to seek information; no need to log in to a separate system.

- Verification functionality compares FAFSA data with submitted documentation and displays differences eliminating the need for human identification – Campus Logic drills down to identifying conflicting verification information so staff can focus on resolving this and do not have to wade through all of the verification to manually find any non-matching information.

- Document imaging syncs with BDMS imaging used currently with Banner – Campus Logic online forms syncs with the current imaging product used with Banner so imaged documents sync with Banner forms as is the established process. This allows easy access to collected documents; auditors can access this information as they have in the past.

- Can set up rules to look for and populate requirement for "C Codes" on FAFSA information instead of relying on human identification – Currently, all FAFSA information is reviewed manually for "C Codes" which is an identification by the Central Processing System that there is an eligibility issue that needs resolved. Once the eligibility issue is determined by the Financial Aid Officer, the required document is posted to the student account. Rules can be established in Campus Logic to review incoming FAFSA data for an "C Codes" and automatically populate the required item to the student's account, eliminating the need for manual review the reducing the chance of human error in catching this.

- Logs and sends corrections, syncing with Banner – When a FAFSA item needs corrected, the Financial Aid Office can initiated the correction through Campus Logic; this action will be synced with Banner records.

- "student view" for staff to help student through the form – When assisting students remotely, users can flip to a "student view" screen within "Campus Logic" to see exactly what the student is seeing. This feature proves to be very helpful since often times the user view is different than the student view.

- Forms output viewable for auditing purposes – All online forms can be captured in a document view that is the same as what an actual form is like currently which will assist with auditing purposes.

Peer Institution Reviews of Campus Logic

Time was taken to reach out to schools who are currently using Campus Logic to seek their input and level of satisfaction with the product. Three different schools were reached including Fort Hays State University, Delaware Community College and Washtenaw Community College.

- **Fort Hays State University (Hays, KS) – Non-Banner School**

  - ✓ Speaking with Director Wendy Rohleder-Sook we learned that FHSU has been with Campus Logic only a short time. The software was implemented in early December. She did state that during their first few weeks they have completed verification of 250 student records from receipt of ISIR to collection of documents all the way through awarding. Their most noticeable impact to date has been the drastic drop of phone calls and questions from students. Additionally, she pointed out that the audit trail is amazing and has already proven to be useful when speaking to students or troubleshooting situations. They have had no student issues to date and are excited about this enhancement for their student.
    The implementation process and integration process since FHSU uses a different information system than Barton.

- **Delaware County Community College (Media, PA) – Banner School**

  - ✓ Caroline Siravo from the Financial Aid office spoke with Barton regarding their experience with Campus Logic.
  - ✓ Delaware CC moved to the Campus Logic software 2 years ago. Caroline confirmed they have been very satisfied with the system. Specifically the intuitiveness of the forms and getting them completed correctly the first time has been a major benefit for them. They no longer spend time going back and forth with students to get forms corrected after they are submitted. Additionally, her favorite piece of the system is the audit trail that CL builds as all communications and interactions with students are captured and

available for review. The ability to use text communications is also one of their favorite features of the system.

- ✓ Their office did experience some unexpected issues with their students. Caroline commented that their students really struggle with getting forms uploaded. To counter this, they have moved to having computers available in office and have student personnel assist them with the process. It sounded like the majority of their students are on-campus and were not used to using any form of electronic documents or electronic submission of documents. She did point out that part of their problem might have not only been students learning this new process but also employees learning to let go of the paper process.
- ✓ Delaware's office is not implementing the integration with document extender and Campus Logic to pull documents into the banner system. Caroline was not satisfied with that decision on their part as they have found that trying to go out and get the individual documents to move into Extender manually is very labor intensive.

- **Washtenaw Community College (Ann Arber, MI) – Banner School**

  - ✓ Washtenaw Community College has been using Campus Logic for the past year. Their Director of Financial Aid, Lori Trapp, stated that prior to CL they had experienced a lag in their process when it came to collecting verification documents from students. For this reason their president gave her the directive to find a solution and approved their addition of the Campus Logic software.
  - ✓ Lori stated that they have no complaints so far with the software. Students have been very responsive to it and they have seen a 23% decrease in phone calls and foot traffic regarding verification documents as a result. While they did not track their processing time prior to implementing Campus Logic, she stated that there is a noticeable decrease in the time it will take them to get documents returned from students. They are using Campus Logic exclusively and not giving students or employees the option to manage verification documents outside of campus logic. (They will upload documents for students at the student's request in the office.)
  - ✓ The audit trail was also mentioned as a favorite feature of the system as well as the text reminders and emails that are automated. She did note that they have used texts for a long time and find that students are far more responsive to text messaging than any other form of communication.
  - ✓ The implementation process that they experienced was just under 30 days. They did opt to integrate document Extender with Campus Logic and highly recommended doing so. She stated that if it was a difficult integration process their IT department did not give any indication of it.

Summary of Correspondence –

- Overall decrease in phone calls from students and foot traffic regarding the verification process.
- Offices are spending less time resolving incomplete documents and conflicting information.

- The audit trail allows the office to have a clear picture of student activity as well as communications with the student regarding their verification process and documents.
- Communicating with students via text has proven to be very effective.
- The Banner schools found implementation to be quick and fairly easy.

Student & Stakeholder Comments of Campus Logic Demo

A short demonstration of the product from the student's view was presented to students and a few staff members outside of the Financial Aid Office. Below is a summary of the survey completed by attendees.

- Please indicate your preference for using online or electronic documents that could be completed on a PC, tablet, mobile phone, or other device.

    - ✓ 100% indicated "Very interested"

- Please indicate your preference for being able to submit required documents electronically once the document has been completed.

    - ✓ 100% indicated "Very interested"

- Rate your preference for using the product demonstrated.

    - ✓ 100% indicated "Very interested"

- Please provide any additional thoughts you would like to share regarding the product demonstrated.

    - ✓ This seems like a great program for all users.
    - ✓ I think for the Ft Riley & Leavenworth campus this would be very useful!
    - ✓ We may run into some issues if students try to use our office computers to upload documents but overall this could really be great!
    - ✓ I think the product is a great idea and seems very easy to work with.
    - ✓ Seems very easy to use. This would be a great product.

Other Alternatives Reviewed

In reviewing other options, Barton staff found the following:

- Regent Software – This software is extremely expensive, would not sync as well with Banner, requiring log-ins to multiple systems, provides more functionality than needed for isolated issue, and would require a more extensive change to processes, a longer implementation time.
    - ✓ $125,000+
    - ✓ Works primarily outside of Banner
    - ✓ Functionality included awarding/etc. which is unnecessary

- Other software solutions – Other solutions have bits and pieces of a solution but are not as comprehensively targeted to Barton's specific needs.

- Build in-house – Barton could try to build this functionality in-house. However, when other schools have tried to do this, they have invested time only to end up purchasing this product eventually. In the long run, this product is already so enhanced with features such as ISIR and other skip-logic, and security features nearly impossible to replicate through an in-house product.
    - ✓ Estimated cost in time and monetary resources – 2 years/$5 million
    - ✓ One school (Weber State University) gave up trying to build in-house and eventually purchased the product.
    - ✓ Fillable PDF forms would not incorporate ISIR-logic
    - ✓ Fillable PDF forms would not incorporate skip-logic
    - ✓ Fillable PDF forms would not comply with e-Sign regulations
    - ✓ Fillable PDF forms would not be mobile device-friendly
    - ✓ Fillable PDF forms would not have electronic upload capability built in
    - ✓ See Appendix 1 for other functionality features compared to fillable PDF's.

Potential Solution Challenges | Plans to Address Challenges

- Connecting the students with the portal – Barton already has challenges getting students connected and using the portal. Planned counter actions:
    - ➢ Create a tutorial for students to show how to connect to and use the portal, and in particular, Campus Logic.
    - ➢ Use the FA Helpdesk position to intrusively connect with students to get them logged-in and using the portal.
    - ➢ Push other promotional and informative portal information to students.

- Availability of computers to students will be critical – From peer institution and demo attendee feedback, computers will need to be made available to students since paper documents will be discontinued.

- ➢ There is already a bank of computers conveniently located within the financial area at the Great Bend location.
- ➢ Financial aid personnel all have college-issued iPads which they can use to assist students with completing documents since the Campus Logic documents are mobile device compatible.
- ➢ Consideration might be given to adding a laptop or iPad at the FA Office at Ft Riley in order for FA representatives to better assist students. With transitioning of the forms from paper to online, this is projected to decrease foot traffic to the Ft Riley and Ft Leavenworth offices freeing front-line staff to focus on helping students enroll and with other issues.

- • Major business process re-engineer project – The implementation of Campus Logic will greatly change Barton's current financial aid business processes for communicating with students, verifying FAFSA applications, and requesting required documentation. Planned counter actions:
  - ➢ Barton's FA Office has already begun mapping out what changes need to implement Campus Logic and stepping through what adjustments would need to be made to current business operations. See Appendix 2.

- • Must provide "Opt-Out" options – Barton will still need to provide an "Opt Out" mechanism for students who choose not to use or do not have the technology to access the online process. Planned counter actions:
  - ➢ Provide an alternate paper or other manual method by which students can complete and submit required documents. This is actually already an option for students through mailing paper documents or providing them face-to-face if the student comes in to the physical location.

- • Use of CL must be included in Barton's FA Business Continuity Plan – The use of Campus Logic must be considered in Barton's FA Business Continuity Plan in case there is a cessation for whatever reason in the providing this service to students. Planned counter actions:
  - ➢ The same tact would be taken as described for the preceding challenge in that an electronic and paper document forms bank would always be kept as the foundation of all required documents. This repository could be accessed in the event Campus Logic functionality became unavailable. This alternate business process would be defined within the FA Business Continuity Plan.

Proposal for Consideration

After thorough vetting of the product, Barton's Financial Aid Office requests consideration of purchase of the Campus Logic solution to meet the identified needs of serving students through maximum efficiency and compliance with federal and other regulations.

This request would require $30,000 for FY17 to be allocated for purchase of the functionality of this product. Campus Logic has provided Barton with a cost estimate (See Appendix 3). [Note: Barton would also have the option to lock in the $30,000 for up to three years.]

Upon agreement to contract with Campus Logic beginning July 1, 2017, Campus Logic would allow early implementation of the product, possible spring, 2017.

Investment Offsets | ROI Projections

Investment Offsets –

To get the financial investment as "budget neutral" as possible, the following items are of consideration:

- Eliminate the need for any overtime – Implementation of Campus Logic would eliminate the need for payment of overtime for financial aid staff, eliminate the need for the annual investment in MappingXpress, and likely eliminate the need to cover verification errors with institutional funds. Just factoring in these expenses reduces the quoted investment by almost half.
    - ✓ 2016 -- $12,700
- Eliminate the need for annual MappingXpress electronic upload functionality
    - ✓ $700
- Reduce payment of college funds to cover verification error coverage
    - ✓ 15-16 -- $1,257 (Note: This is what was found. An audit or Program Review might reveal other verifications unknown at this time which could have an accompanying financial liability.)

- **Total direct offset: $14,657**

Return on Investment (ROI) Projections—

Campus Logic has provided a projection of possible ROI with use of the product. See Appendix 3. With increased process efficiencies, the product has the potential allow Barton to not only recoup the investment but to also see an increase in revenue due to increased enrollments and completion numbers.

Vision

Barton Community College will be a leading educational institution, recognized for being innovative and having outstanding people, programs and services.

- ✓ The implementation of Campus Logic would place Barton's financial aid application and verification process into a leading position compared to peer institutions.

Mission

The Mission of Barton Community College is to provide quality educational opportunities that are accessible, affordable, continuously improving and student focused. Barton is driven to provide an educational system that is learning-centered, innovative, meets workforce needs, and strengthens communities.

- ✓ Partnering with Campus Logic would improve financial aid application and verification processing efficiency. In addition, the use of Campus Logic has the potential of increasing the percentage of completed applications and completing applications faster making enrolling and purchasing books more affordable to students.

ENDs

"Barton Experience"

- ✓ Integrating Campus Logic into the application process will enhance the student experience through a more efficient, more effective, and more responsive communication and document submission mechanism.

Core Priorities

- Drive Student Success
- Emphasize Institutional Effectiveness

- ✓ Integrating Campus Logic would help to drive student success by simplifying and streamlining the financial aid process, allowing students to focus on enrollment and coursework instead of completing financial aid requirements and worrying about how to pay for direct and indirect expenses.
- ✓ Partnering with Campus Logic to make the financial aid process should increase the number of applications awarded and shorten processing time by Barton's Financial Aid Office.

Tie to Accreditation

5.A. 1. The institution has the fiscal and human resources and physical and technological infrastructure sufficient to support its operations

Appendices

- Appendix 1 – Comparison of PDF data-enterable features versus Campus Logic features -- http://docs.bartonccc.edu/finaid/Wiki%20Documents/clformssolutions.pdf
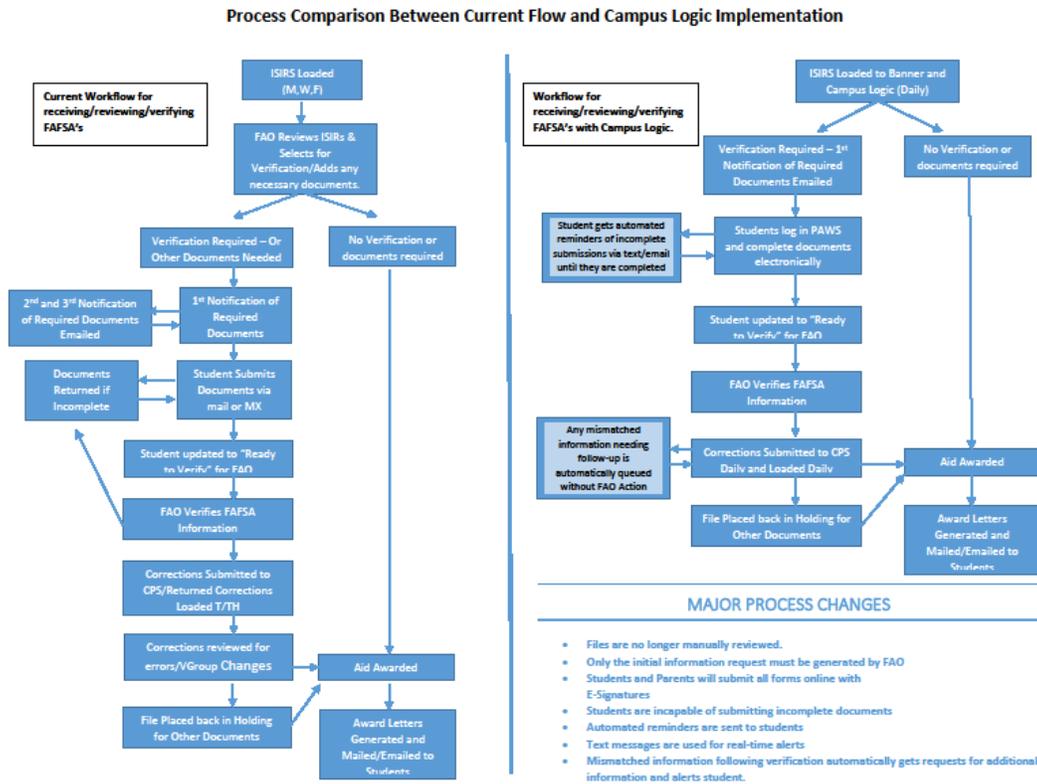
campuslogic

FEATURE & BENEFIT COMPARISON

How does CampusLogic's StudentForms platform stack up against fillable PDFs that load into an imaging system?

BENEFITS FOR THE SCHOOL	Fillable PDF Solution	CampusLogic StudentForms
Imaging System Integration	yes	yes
Telephone and email support	yes	yes
Improves student completion time	yes	yes
V1 - V6 Verification groups	yes	yes
Email notifications	yes	yes
C Codes	no	yes
SAP Appeals	no	yes
Professional Judgments	no	yes
Ensures FERPA compliance w/ separate parent & student logins	no	yes
Minimizes student errors and exceptions through logic/validation	no	yes
Captures uploads of additional, supporting documents	no	yes
100% paperless for FA office	no	yes
200 additional canned information requests	no	yes
Automated Follow-up	no	yes
SMS text messaging notifications	no	yes
Automated "Smart File Review" against ISIR data	no	yes
ISIR correction batching	no	yes
Customizable communication templates	no	yes
SIS Integration	no	yes
SSO integration	no	yes
User interaction logging	no	yes
Fraud protection through IP logging	no	yes
Annual regulatory updates	no	yes
Unlimited storage and backup	no	yes
AES 256-bit data encrypted files	no	yes
HTTPS encrypted communication	no	yes
Two-factor authentication	no	yes
Dashboard reporting	no	yes
Employee performance measurements	no	yes
Full implementation in under 30 days	no	yes
No ongoing support and maintenance required of school IT dept.	no	yes
User groups and permissions	no	yes
Testing environment for administrators	no	yes
Online knowledgebase w/videos and FAQ	no	yes
Free software upgrades/updates	no	yes
Availiblity, scalability, reliability of Microsoft Azure cloud services	no	yes
Demonstrated enrollment increases of 10-20%	no	yes
Demonstrated staff efficiency increases of 20%	no	yes
BENEFITS FOR THE STUDENT and PARENT	Fillable PDF Solution	CampusLogic StudentForms
Telephone and email support	yes	yes
Compliant e-signature for student	yes	yes
Compliant e-signature for parent	no	yes
Personalized Student Experience	no	yes
100% paperless for student and parent	no	yes
Optimized for mobile devices	no	yes
Pre-filled web forms	no	yes
Step-by-step guided workflow	no	yes
Enables uploads of additional, supporting documents	no	yes
No PDF application required	no	yes
Online knowledgebase w/ videos and FAQ	no	yes

- Appendix 2 – Process map of Barton's current business processes compared to Campus Logic business processes

Process Comparison Between Current Flow and Campus Logic Implementation

Current Workflow for receiving/reviewing/verifying FAFSA's

- ISIRS Loaded (M,W,F)
- FAO Reviews ISIRs & Selects for Verification/Adds any necessary documents.
- Verification Required – Or Other Documents Needed
- No Verification or documents required
- 2nd and 3rd Notification of Required Documents Emailed
- 1st Notification of Required Documents
- Documents Returned if Incomplete
- Student Submits Documents via mail or MX
- Student updated to "Ready to Verify" for FAO
- FAO Verifies FAFSA Information
- Corrections Submitted to CPS/Returned Corrections Loaded T/TH
- Corrections reviewed for errors/VGroup Changes
- Aid Awarded
- File Placed back in Holding for Other Documents
- Award Letters Generated and Mailed/Emailed to Students

Workflow for receiving/reviewing/verifying FAFSA's with Campus Logic.

- ISIRS Loaded to Banner and Campus Logic (Daily)
- Verification Required – 1st Notification of Required Documents Emailed
- No Verification or documents required
- Student gets automated reminders of incomplete submissions via text/email until they are completed
- Students log in PAWS and complete documents electronically
- Student updated to "Ready to Verify" for FAO
- FAO Verifies FAFSA Information
- Any mismatched information needing follow-up is automatically queued without FAO Action
- Corrections Submitted to CPS Daily and Loaded Daily
- Aid Awarded
- File Placed back in Holding for Other Documents
- Award Letters Generated and Mailed/Emailed to Students

MAJOR PROCESS CHANGES

- Files are no longer manually reviewed.
- Only the initial information request must be generated by FAO
- Students and Parents will submit all forms online with E-Signatures
- Students are incapable of submitting incomplete documents
- Automated reminders are sent to students
- Text messages are used for real-time alerts
- Mismatched information following verification automatically gets requests for additional information and alerts student.

http://docs.bartonccc.edu/finaid/Wiki%20Documents/clprocesscomparison.pdf

- Appendix 3 – Campus Logic Business Case with Return on Investment Projections

http://docs.bartonccc.edu/finaid/Wiki%20Documents/clprocesscomparison.pdf

PROVEN ROI

The Case for Easy, Mobile, and Personalized Financial Aid

OVERVIEW

Improving access to higher education and ensuring student success is a key part of our financial aid mission. But, our financial aid office is consumed with manual processes – reviewing paper files, chasing students to get accurate and complete info, indexing and imaging documents. Paper-heavy, manual processes tie up our staff, keeping them from counseling students.

Add to that students who struggle to get through the financial aid process. Paperwork, fax machines, and snail mail are completely foreign to them. Today's students live on their phones – they're banking online, booking travel online, taking classes online. They want the same digital, mobile experience from financial aid.

PROPOSED SOLUTION

CampusLogic's cloud-based software will transform the way we deliver financial aid, making it easy, mobile, and personalized – all while delivering the best student experience at a fraction of the time and cost.

- + Increase student completion rates
- + Increase enrollment
- + Increase staff efficiencies
- + ELLUCIAN ALLIANCE PARTNER

FINANCIAL AID CHALLENGES

↓ Unfavorable FA completion rates

$ Enrollment revenue loss

🖶 Manual processes that don't scale

📄 Paper-intensive procedures

☹ Poor student experience

☒ High rate of student errors, incomplete forms

🛡 Manual regulatory updates

☎ High call volumes

PPY Early FAFSA & PPY volume increases

SUMMARY FINANCIAL RETURN ANALYSIS

Benefits	Year 1	Year 2	Year 3
Increased Enrollment	$364,400	$364,400	$364,400
Improved Staff Efficiencies	77,700	77,700	77,700
Total Benefit	$442,100	$442,100	$442,100
Investment			
Implementation	Waived	–	–
Annual Subscription	30,000	30,000	30,000
Total Investment	$30,000	$30,000	$30,000

1.374%	1 Month	Unlimited	30 Days
Return On Investment	Payback Period	Users, Uploads, Storage & Backup	Most Schools Live In Less Than 30 Days