

# Using Technology to Improve Title IV Efficiency & Compliance

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# Agenda

**Automation   Compliance**

**Mobile Technology**

**Data Security**

## Federal Student Aid Strategic Plan FY 2023–27

THIS PLAN WAS ESTABLISHED THROUGH A COMPREHENSIVE INTERNAL REVIEW PROCESS THAT INCLUDED FSA BUSINESS UNITS, ED'S OFFICE OF THE UNDER SECRETARY, AND OTHER ED STAKEHOLDERS. THE FIVE-YEAR PLAN DISCUSSES THE FOLLOWING STRATEGIC GOALS:

- GOAL 1: IMPROVE CUSTOMER SERVICE AND OUTCOMES FOR STUDENTS AND BORROWERS
- GOAL 2: ADVANCE EQUITY AND ACCESS TO STUDENT FINANCIAL ASSISTANCE
- GOAL 3: STRENGTHEN ENGAGEMENT AND ACCOUNTABILITY FOR EDUCATIONAL AND FINANCIAL INSTITUTIONS
- GOAL 4: INCREASE WORKFORCE AND WORKPLACE CAPABILITIES
- GOAL 5: BOOST OPERATIONAL EFFICIENCY





## WORKFLOW

# AUTOMATION HELPS

- REDUCES MANUAL WORK & COSTS
- IMPROVES ACCURACY & DATA SECURITY
- IMPROVES CUSTOMER SERVICE
- ALLOWS FOR MORE INGENUITY



**WORKFLOW** (As of 06-29-2022 11:53 AM) [Refresh Dashboard](#) | [View](#)

File Uploads	6 Pending		0 Processed
Packaging Batches	2 Incomplete	1 Submitted	0 Processed
Document Tracking	14 Needed	0 Received	0 Approved
Disbursement Batches <a href="#">(Click for Funds Info)</a>	1 Open	1 Pending	0 Processed
Verification/C Code	2 Selected	0 Scanned	0 Processed
Reconciliation	3 Queued	0 Pending	0 Completed
NSLDS Enroll. Rosters	3 Queued	0 Pending	0 Completed
Funding Estimate	122 Unsigned	34 Pending Sig.	2 Signed
R2T4	2 Pending	1 Submitted	0 Approved
Question Queue	0 Queued	0 In Progress	0 Answered
File Pick Up	0 Waiting		0 Retrieved

# AUTOMATE THE PROCESS

## DON'T GET BOGGED DOWN IN REGULATIONS AND PROCESS

- ELECTRONIC AUTOMATED DOCUMENT PROCESS
- AUTOMATED TRACKING
- SYSTEM GENERATED PACKAGING
- SMART LOGIC = COMPLIANCE
- SMOOTHER PREDICTABLE FINANCIAL AID PROCESS

# Document Tracking

WHAT'S NEEDED –  
IDENTIFY WHAT'S NEEDED FROM THE  
STUDENT  
VERIFICATION/C CODES

- TRACKING –
  - STUDENT STATUS
  - EFFECTIVE FOLLOW UP
  - REALTIME UPDATES

Document Tracking	17 Needed	0 Received	0 Approved
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Student Name	Campus Name	Enroll. Status (System)	Program	Start Date	Doc. Status	Document Type	Doc. Rule	Feedback/Reason	FA Rep
Campus Name: Campus A									
<u>ALI, FSTUDENT</u>	Campus A	FUTURESTART	BUSB v.0	08/15/2021	NEEDED	Student Tax Document (1040/Transcript)	2021 V1 - Independent, Student T...		
<u>Marley, Robert</u>	Campus A	FUTURESTART	Business Management v.0	08/15/2021	NEEDED	Funding Estimate			Joe Smart
<u>MCNEIL, Demo</u>	Campus A	FUTURESTART	Medical Assistant v.0	08/12/2018	NEEDED	Identification	1819 CC_140 - Social Security - SS...		Test Test
<u>Mullings, Siana</u>	Campus A	FUTURESTART	Massage Therapy v.0	08/21/2022	NEEDED	Identification	FUTURESTART/ACTIVE PROCESSI...		
<u>Smith, Fred</u>	Campus A	ACTIVE	Business Management v.0	01/06/2021	NEEDED	Student Tax Document (1040/Transcript)			

# Student Driven Packaging

- START EARLY
- USE DATA KNOWLEDGE TO REDUCE TOUCHPOINTS
- IMMEDIATE RESULTS

Student Information

Student Information Continued

Institution Information

Student Package Completion

## Student Information

STUDENT ID:

DATE OF BIRTH: \*

FIRST NAME: \*

CITIZEN:

LAST NAME: \*

GENDER:

SOCIAL SECURITY NUMBER: \*

\* Required fields

Next

Student Information

Student Information Continued

Institution Information

Student Package Completion

## Institution Information

NAME:

PROOF OF GRADUATION:

ADDRESS LOCATION:

VIEW TUITION COST AND FINANCIAL ESTIMATE? ☒ YES

DATE:

\* Required fields

Previous Submit

# Packaging

- BUILT IN AWARD REGULATIONS
- AUTO PACKAGE BOTH TITLE IV & NON-TITLE IV AWARDS
- ELECTRONIC SIGNATURE/ACCEPTANCE

**Financial Aid Funding Estimate**  
Funding Estimate ID: 1649

Help, zstevent! Log off

Bravado College (1)  
1000 College Road  
Fort Lauderdale, FL 33333  
(800-123-4567) www.bravado.edu

Home | Links | Workflow | Report Center | Data Analytics | Queues

Home | Bravado College | Funding Estimates | Robert Marley | Funding Estimate

**School Notice**

The purpose of this notice is to provide students enrolling in Bravado College with a reasonable estimate of the federal programs they will be eligible to participate in and estimates of the amount of aid available to them while attending Bravado College. These estimates are based upon the results received from the U.S. Department of Education referred to as the Institutional Student Information Report (ISIR). The ISIR is a report reflecting the personal financial information you reported when you completed the Free Federal Application for Student Assistance (FAFSA). If that information proves to be inaccurate or unintentionally falsely reported these estimates may be revised. If you and/or your family's income remains reasonably the same originally reported we expect that the estimates provided will remain reasonable and accurate. The financial aid awards listed below will inform you of what aid you may be eligible to receive to obtain your education. Most federal student loans have loan fees that are deducted proportionately from each loan disbursement you receive. It is this fee the money you receive will be less than the amount you actually borrow. You're responsible for repaying the entire (gross) amount you borrowed and not just the (net) amount you received.

**Student Information**

Marley, Robert  
ID: 123456789

**Program Information**

**Bravado College**  
1000 College Road  
Fort Lauderdale, FL 33333  
(800-123-4567) www.bravado.edu

Program: Massage Therapy  
Program Units: 1200.00 Hours  
Location: Campus B  
Academic Level: 1st year, undergraduate/never attend

Unit Reduction: 0.00 Hours  
Start Date: 9/21/2022  
Tuition Scenario: In State Tuition Rate

**Cost of Attendance Information**

Tuition & Fee	\$15,095.50
Registration Fee	\$100.00
Books and Supplies	\$1,000.00
Misc. Fees	\$0.00
Room and Board	\$44,500.00
Transportation	\$4,500.00
Personal Expenses	\$5,625.00
Misc. Expenses	\$0.00
Academic Year COA	\$33,147.67
<b>Total Program Cost:</b>	<b>\$49,721.50</b>
	(Direct Indirect cost)

**ISIR Information**

**Signature Information**

**Totals**



# File Transfers

- AUTOMATE COD, NSLDS & CPS COMMUNICATIONS
- NO TRANSMISSION QUEUES
- NO MISSED FILES

COD



COD Updates

Enr Updates

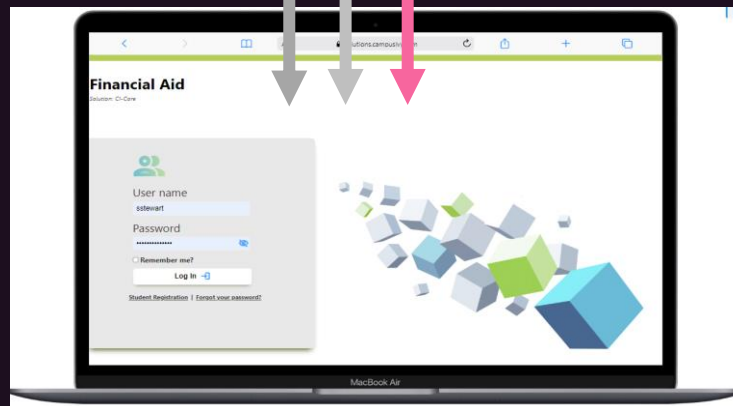
Gateway

ISIRs

NSLDS



CPS



Campus ivy

EARTH'S MIGHTIEST HEROES  
FASFAA CON 2023

<b>13</b> Pending		<b>1087</b> Processed
<b>1</b> Incomplete	<b>10</b> Submitted	<b>53</b> Processed
<b>519</b> Needed	<b>28</b> Received	<b>508</b> Approved
<b>5</b> Open	<b>8</b> Pending	<b>15</b> Processed
<b>44</b> Selected	<b>7</b> Scanned	<b>30</b> Processed
<b>0</b> Queued	<b>1</b> Pending	<b>4</b> Completed
<b>2</b> Queued	<b>0</b> Pending	<b>2</b> Completed
<b>215</b> Unsigned	<b>32</b> Pending Sig.	<b>207</b> Signed
<b>390</b> Pending	<b>0</b> Submitted	<b>0</b> Approved
<b>1</b> Queued	<b>0</b> In Progress	<b>0</b> Answered
<b>217</b> Waiting		<b>22</b> Retrieved

# Dashboard

- ALERTS
- USER FRIENDLY
- DATA ANALYTICS

## Pay List Estimates (as of today)\*

**(\$94,296.00)**

[REFUNDS](#)

**\$162,678.50**

[C99: READY TO PAY](#)

**\$17,575.00**

[C97: READY - BETWEEN 7 AND 14 DAYS FROM NOW](#)

**\$28,293.00**

[C96: READY - BETWEEN 14 AND 21 DAYS FROM NOW](#)

**\$9,458.00**

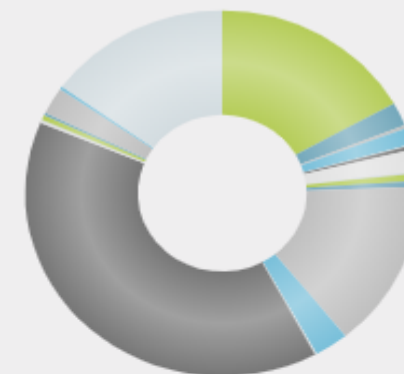
[C95: READY - BETWEEN 21 AND 28 DAYS FROM NOW](#)

**\$13,020.00**

[C94: READY - MORE THAN 28 DAYS FROM NOW](#)

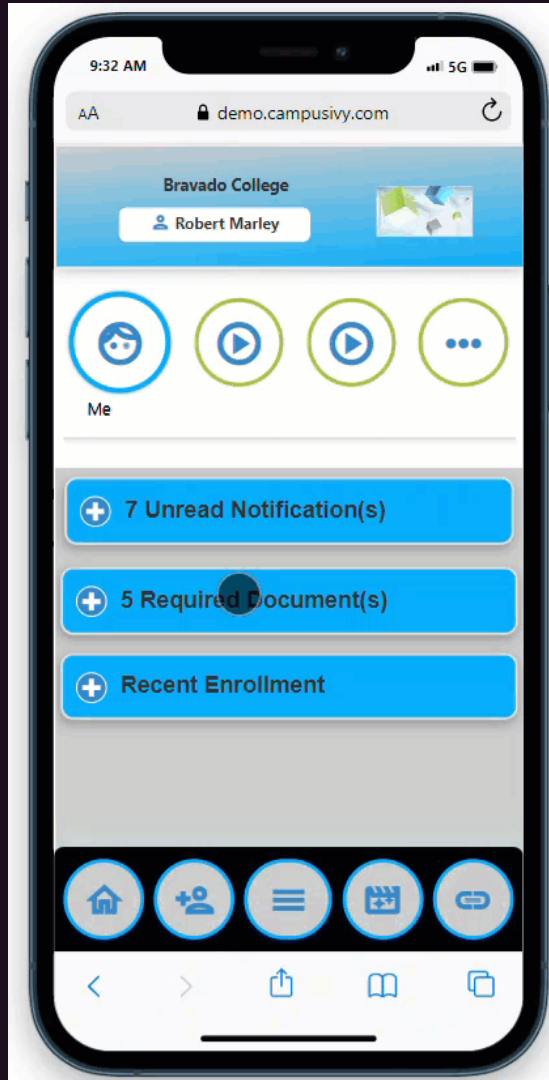
**\$5,634,470.00**

[C00: NOT READY](#)



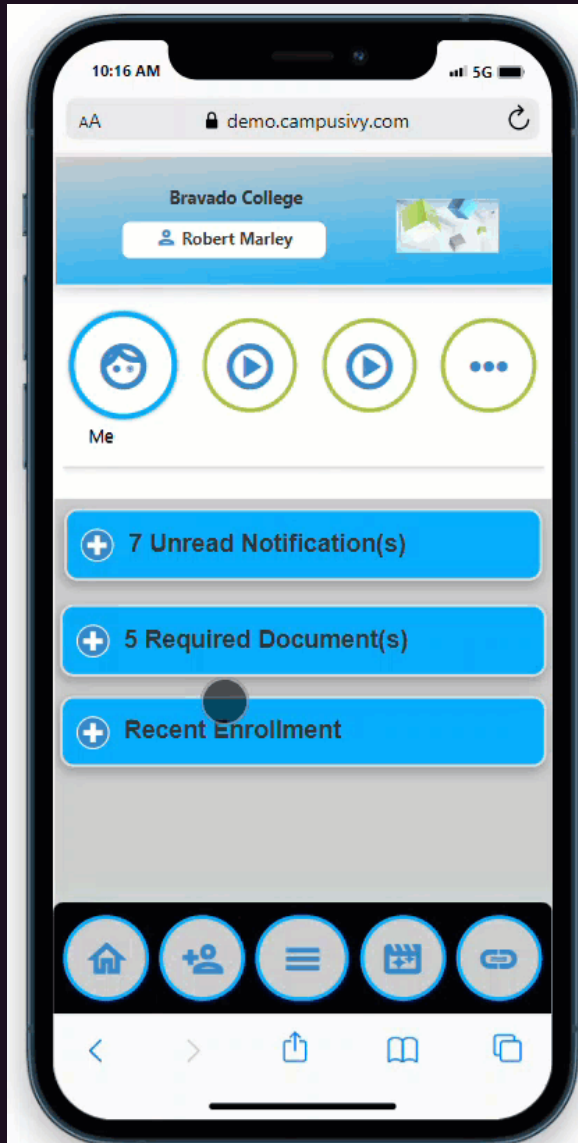
(\*) System-driven assessment of transactions that have

(\*\*) Open batches will be moved to Pending at the expi



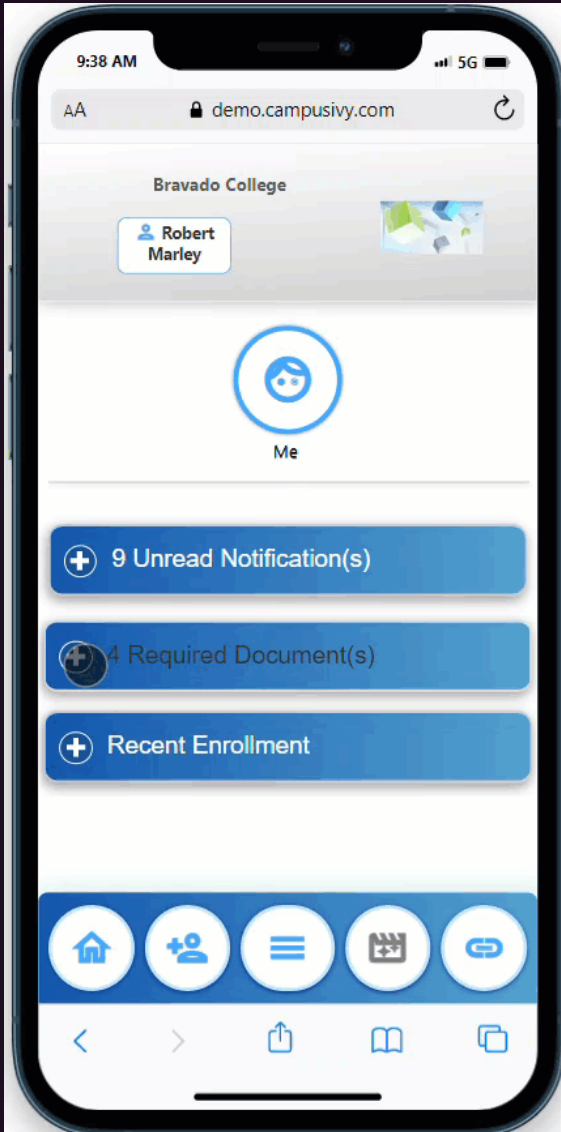
## STUDENT PROCESS SHOULD BE

- **EFFICIENT**
- **ELECTRONIC FORMS AND COMMUNICATION**
- **SEAMLESS APPLICATIONS**
- **EASY TRACKING AND FOLLOW UP**



# How do I Pay for School?

- **TIMELY**
- **BEST ESTIMATE**
- **ACCURACY**
- **MOBILE COMMUNICATION**



# How do I submit my documents?

- **E-FORMS**

- STUDENT FRIENDLY
- ACCURATE
- SECURE
- EFFICIENT



# How do I submit my documents?

- **PICS**

- STUDENT FRIENDLY
- ACCURATE
- SECURE
- EFFICIENT

9:38 AM demo.campusivy.com 5G

**First Name**  
ROBERT

**Last Name**  
MARLEY

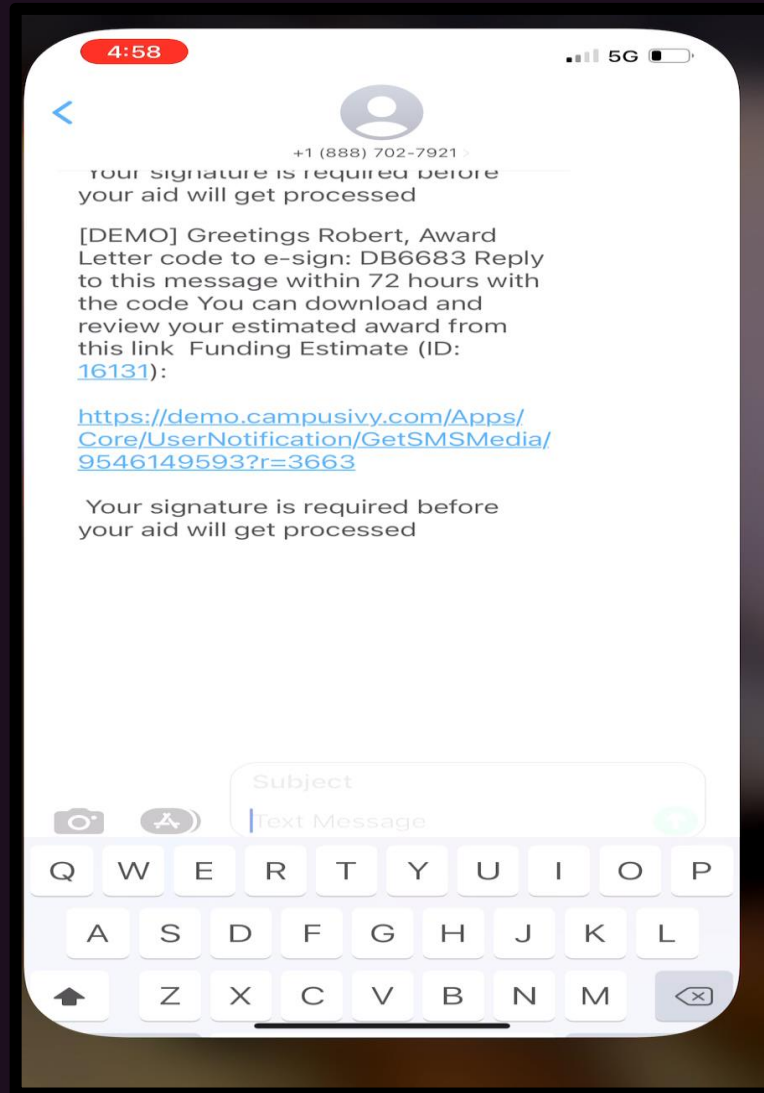
**SSN**  
999445555

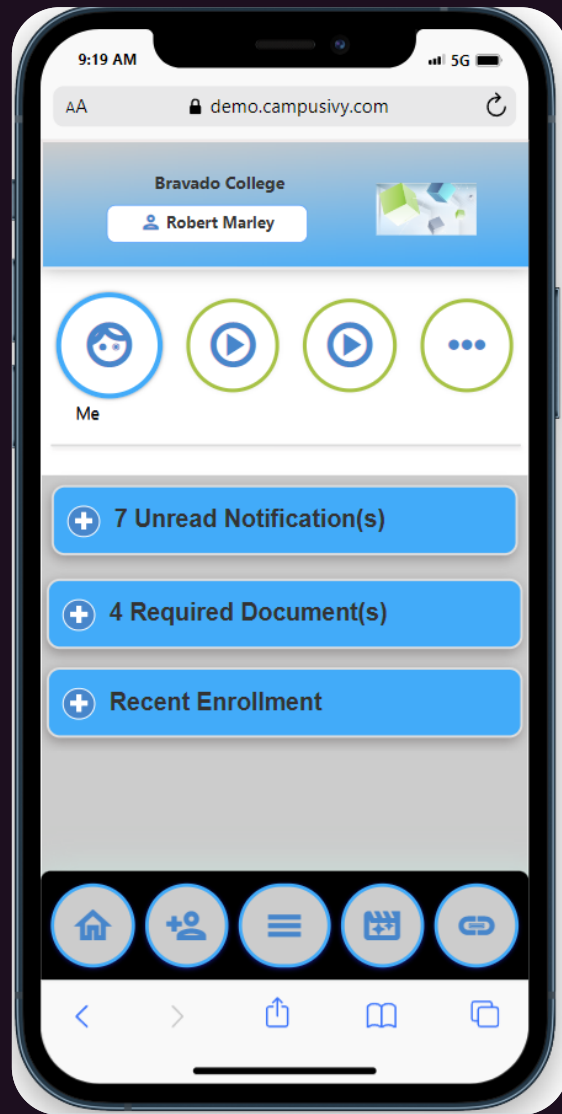
**Date of Birth**  
06/04/1993

# ONGOING COMMUNICATION

- TEXT MESSAGES

- ACCESSIBILITY
- ABILITY TO TEXT RESPONSE

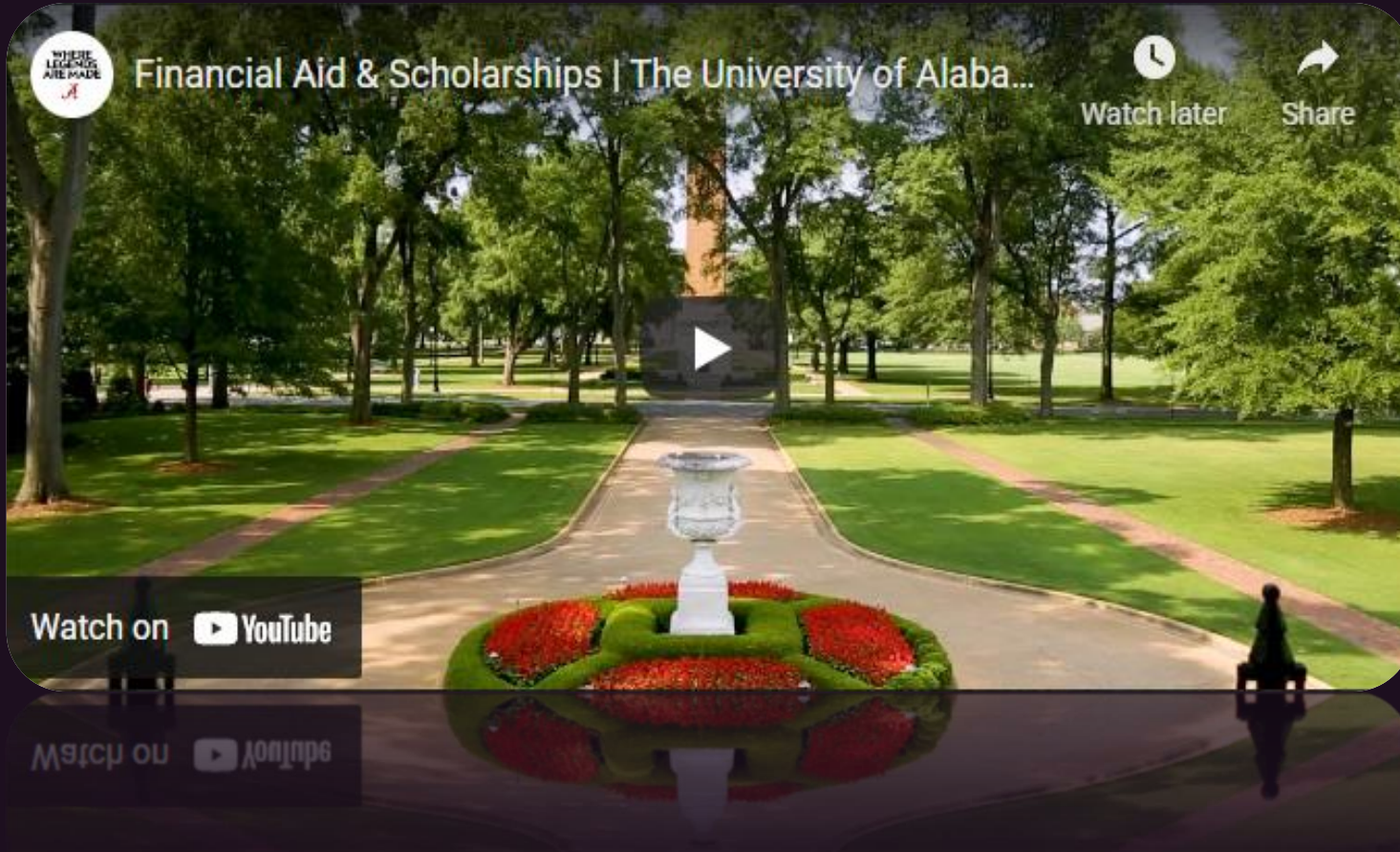




# ONGOING COMMUNICATION

- PUSH INFORMATION OUT
- STUDENT PORTAL

# ONGOING COMMUNICATION



- **PUSH THE INFORMATION OUT**
- **SCHOOL'S WEBSITE**

# ONGOING COMMUNICATION

- **PUSH THE INFORMATION OUT**
- **YOUTUBE**



## Campus Ivy – Overview Video

1 view • 22 hours ago

C Campus Ivy

Campus Ivy - OVER 40 YEARS OF EDUCATION EXPERTISE We provide solutions to your financial aid needs.

New

1:31

## Campus Ivy - Automated Award Letter System

354 views • 3 years ago

C Campus Ivy

This is a demo of Campus Ivy's Automated Award Letter System.

2:06

## Campus Ivy - Verification System

343 views • 3 years ago

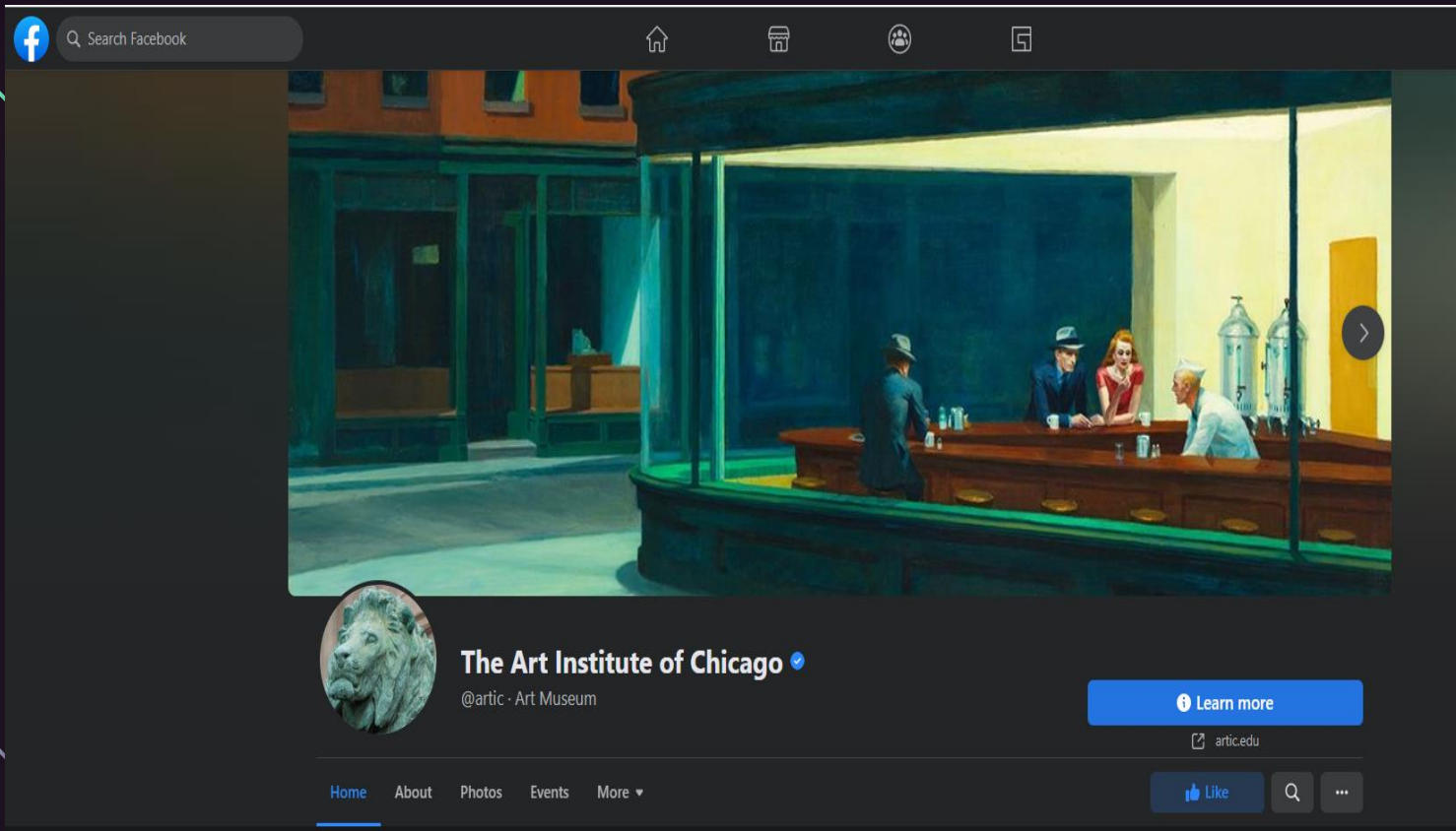
C Campus Ivy

This a demo of Campus Ivy's Verification System.

1:55



# ONGOING COMMUNICATION



- **PUSH THE INFORMATION OUT**
  - **SOCIAL MEDIA PLATFORMS**
    - **FACEBOOK**
    - **INSTAGRAM**
    - **TWITTER**
    - **TIKTOK**

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