

**California State University, Chico**  
**Financial Aid Office**  
**Annual Report of Goals**  
**2002-2003**

**Annual Objectives 2003/04**

1. Continue plans and set goals for CMS implementation. (Goals 1,2,3,4,5,6)
2. Prepare for Peer Review slated for April 2004 in preparation for re-certification in 2005. (Goals 1,2,3,4,5,6)
3. Evaluate current functions/positions for Financial Aid and Scholarships to streamline processes and increase efficiencies. (Goals 1,2,3,6)
4. Reformat Policies/Procedures manual to conform to best practices and evaluate current policies for possible revision. Include Scholarship procedures and forms review. (Goals 1,2, 6)
5. Produce Financial Aid/Scholarship Master Calendar.

**2002/03 Annual Objectives**

**Objective:** Provide an online scholarship application. Design and develop a comprehensive site that is user friendly. Use data collected on the Web as input to scholarship software, bypassing the need for separate and redundant data entry. (Goals 1 and 2)

**Progress:** The scholarship application was collected on-line for 03/04. 1,729 applications were started, 1,338 were completed and 1,328 were processed (the discrepancy is due to late filers). The old process required that paper applications be opened, date-stamped and coded. A minimum of 24 data elements per application had to be manually entered into a database. The new process saves printing, postage, handling, and data entry. This new process automated the data entry of 31,872 data elements. Student feedback was generally positive.

**Objective:** Provide electronic award notifications and other electronic correspondence with students. Move from traditional mail to e-mail for large, generalized notifications. Ensure appropriate security for confidential, individualized student information. (Goals 1 and 3)

**Progress:** Award letters for 2003-04 were sent electronically (and continue to go out throughout the year). We estimate total cost savings

through this award year at \$49,802 (includes printing and postage, only – not labor). Maintaining email addresses is a workload issue. The process was generally well received. Students who had no email were sent hard-copy documents. FAO provided hard copy or printing assistance to those students who had trouble down-loading their documents

**Objective:** Install imaging system. Scan and index all documents for 2002/03 and beyond. Train staff to use the imaging system. (Goals 1, 3, and 6)

**Progress:** Document imaging has been implemented. Admissions, Records, and Financial Services have also implemented imaging systems. We have scanned all our financial aid documents for 02/03 and are continuing for 03/04. Fall start-up was the smoothest in memory. We were able to finalize significantly more files prior to the first disbursement, getting money to more students before school started (see Measure 4).

**Objective:** In cross-functional collaboration, begin implementation of PeopleSoft Student Administration Software. Provide technical and functional representatives to the implementation team. Develop process maps of all relevant financial aid processes. Develop backfill strategy to compensate for lost staff whose primary functions will be CMS implementation. Provide training for those hired to backfill other positions. Begin training for functional representatives. (Goals 1, 2, 3, 4, 5, 6)

**Progress:** Process maps were completed. Jim Cragle and Wendi Beane completed training in PeopleTools and SQR. Jim, Dan Reed, and Betsy Navarra attended the HEUG in Dallas in March. The team has been meeting with IO Consultants since February.

**Objective:** Enhance software to ease summer aid processing. Provide separate summer aid database with interfaces to regular financial aid software (FARMS). Enhance disbursement communications with Financial Aid Business Services. (Goals 1, 2, and 3)

**Progress:** A summer database was created. Summer aid was provided to 926 students, with 210 revisions. These were all processed manually. Fees were deferred for 491 students for R term, and 114 for I term. Disbursements were processed for 629 students – 426 for R term, 46 for I term, and 121 disbursed in spring as part of the summer award. New reporting tools have been developed and for the first time, we can provide figures on aid types and amounts disbursed for summer (see Measure 6).

**Objective:** Collaborate with other campus departments to implement real-time registration. Ensure proper accessibility for financial aid students and accommodate for later fee payment deadlines based on federal regulations that restrict the timing of financial aid disbursements. (Goals 1, 2, and 6)

**Progress:** All offices involved worked together and implemented this project. Financial Aid students were able to register on time and their fees were deferred, as they should have been.