

WSSU Achieves Amazing File Verification Results with Multi-Pronged Approach

In 2011, Robert Muhammad was a man on a mission when he became Director of Financial Aid at Winston-Salem State University (WSSU), one of North Carolina's Historically Black Colleges and Universities. He had a 90-day plan to achieve better customer service, demonstrate empathy and provide good data to students and parents. Since then, Muhammad has made significant progress toward his

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goals. By educating other university departments about financial aid processes and forming strategic partnerships, he developed a holistic approach that has produced outstanding results.

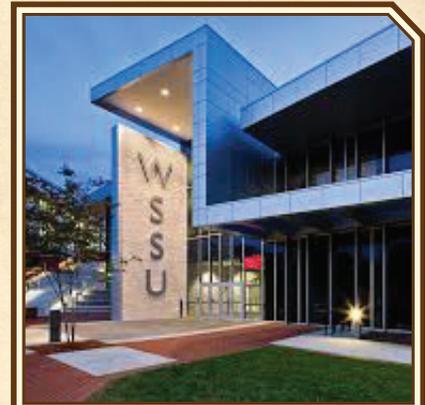
For the second year, the University's financial aid office has used an automated verification service offered by College Foundation, Inc. (CFI) and FAS. Muhammad's team has achieved a 78 percent completion rate – ranking the university in the top percentile nationwide. The aid office is further

along in this year's financial aid cycle than ever before, according to Muhammad.

“It's ironic that we've managed to put the humanity back into financial aid with an automated service,” he said. “With time-consuming file verification tasks off their plates, our staff has more one-on-one time to talk to students who need their assistance.”

Offered through a public/private partnership between CFI and FAS, the automated service first began four years ago as a pilot program in participating N.C. community colleges. It offers an efficient, compliant way to handle verification using an online interview, web forms and electronic signatures in a “student friendly” format. Some participating schools have seen as much as 50 percent more aid processed, including Pell, available by the fall registration/fee payment deadline. The service is now available to institutions nationwide.

“It has been enjoyable to work with CFI and FAS,” Muhammad said. “It was a learning experience on both sides. Both companies were responsive, caring, flexible, and concerned with what would be best



**Winston-Salem
State University**

for their customers and also for students.”

Finding that ‘secret sauce’

But the verification process can't be completed on time without active student engagement. At WSSU, Muhammad has found the “secret sauce” for connecting with students through a multi-pronged approach that encourages them to respond to information requests promptly and turn in their documents early. His tactics include:

- Regularly scheduled e-mail follow-ups from both CFI and WSSU
- Actively tracking data and closely monitoring results

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- Offering a “One Stop” day where students can visit the financial aid office to ask questions and submit documents
- Partnerships with other university offices to reinforce the importance of turning in documents on time

“In March, we began a concerted effort to track the progress of verification,” said Muhammad, who has a passion for tracking, and analyzing trends as well as discovering and removing stumbling blocks. “For every e-mail that doesn’t go out, a student may decide to go somewhere else.” In addition to the communication plan provided by CFI and FAS, the financial aid office also sent out its own correspondence to guide students and parents to the School Servicing website. The office was careful to tailor the correspondence using similar language used by CFI. Muhammad developed a procedure for coding to extract data and engaged academic counselors to begin looking at spreadsheets of students in progress.

“We also asked our University College academic success counselors to reach out and contact students by phone,” he said. “If we determined that students were not returning to WSSU, we removed them from processing so we would have a smaller pool.”

In May, the financial aid office

sponsored “One Stop” sessions where students could come into the office on a specified schedule to submit documents for verification and have their financial aid questions answered. Our emphasis was on continuing students. Historically, they have completed their tasks much later in the summer.

Bombardment pays off

“We kept bombarding students with information and began tracking our percent completions,” Muhammad said. “We wanted to assess the status of file completions before we got into final registration.”

Requesting a list of students currently in the verification pipeline, Muhammad and his team looked at various issues such as missing forms or documents, focusing on students who had completed three fourths of the process. If students hadn’t engaged by then, it was unlikely that they could complete the process in time for registration.

“We packaged 5,400 students for fall registration,” Muhammad said. “Of that, 1,570 were verified through FAS. Just before our multiple “One Stop” sessions in August, we already had approximately 5000 students packaged. We had 500 (60 percent) freshman who could walk on campus and start classes as they had completed all of their requirements. In the past, there

Three Tips for Success

Muhammad offers three secrets to engaging students in the file verification process:

1. Communicate in multiple ways. Students are not monolithic. Meet them where they are. Use postcards, texts, placards, video vignettes, Facebook, Twitter and Instagram.
2. Use a holistic approach to get other university departments involved as financial aid partners. Help colleagues understand the importance of a timely verification process. If students can’t enroll on time, they may go elsewhere. This impacts not only the bottom line, but also job security. Everyone at WSSU is responsible for keeping students enrolled. Muhammad says he uses the tagline, “FTE (Full-Time Enrollment) impacts FTE (Full-Time Employment.)”
3. Work hard to analyze and track results. Identify problem areas as quickly as possible. This involves some late nights. Every moment lost in the verification process is a moment of opportunity to retain students.

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would have been a bottleneck.”

Although Muhammad says he’d like to be “20 percent better,” he believes the office has moved from an “o.k. verification” process to a much better process. “I was glad to come in and not see a line out the door,” he said. “Typically, the financial aid office is blamed for creating bottlenecks. But we’ve demonstrated that our processes have gotten better, so other departments can feel more confident in our product.”

He noted with pride that the

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university’s Provost commended the office for making “substantial improvements in financial aid this year” at a luncheon to celebrate the success of registration.

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“I’ve always had a drive to make processes better for students,” Muhammad said. “I enjoy the thrill of the hunt to solve problems and address issues. When I looked at verification, I realized that we needed something different. It makes more fiscal sense for us to rid ourselves of time consuming, repetitive tasks such as verification so we can put resources elsewhere to benefit students. This kind of smart business model offers the potential for students to get the same kind of service improvements from all our departments.”

As the world gets smaller,

Muhammad says he sees more opportunities for collaboration to occur in different ways. “CFI always processed our loans in North Carolina. I expect this kind of partnership between CFI and FAS to enable automated verification for both NC institutions, and those all across the country.”



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