Developing a Web-based Financial Aid System
Today’s Agenda ....

Introduction
Pilot Project with Capital Community College
Technical Elements of Web-based System
Development Modules
Benefits of a Web-based System
Delivery Calendar for the 2003-04 AY

Connecticut Community Colleges

Education That Works For a Lifetime
Pilot Project with Capital Community College.....

In the 2001-02 Award Year.....
- 2800 financial aid applicants
- 1300 financial aid recipients
- $3.5 million in financial aid

In the 2002-03 Award Year.....
- 2300+ financial aid applicants
- 1200+ financial aid awards

Connecticut Community Colleges

Education That Works For a Lifetime
Please Read Carefully

The purpose of this instruction sheet is to provide you with the necessary information you need to successfully complete the financial aid application process. We want to be sure that you receive all the financial aid for which you are eligible. Please contact us if you have any questions. We are here to assist you!!! You can email us at CA-FinAidHelp@ccc.commnet.edu

Priority Timetable

While we accept applications all year, in order to ensure priority consideration, your results from the FAFSA and any other required documentation must be received in the Financial Aid Office at Capital Community College by:

Academic Year 2002-2003

Fall & Spring Semesters:
June 1, 2002 – Returning students
July 1, 2002 – Newly enrolled students

Spring Semester Only:
December 1, 2002

Student’s Responsibility

Capital Community College expects the student to initiate the application process in a timely manner, and considers it the student’s responsibility to complete the application on time. Incomplete applications will not be reviewed. Students and their families should be aware that they are completing applications for federal, state, and college funds. Students are also expected to be familiar with the general provisions of financial aid. To help you understand this process, Financial Aid Workshops are held throughout the year. Information on financial aid programs, regulations, and procedures are found in the College catalog. Deliberately misreporting can result in civil and criminal liabilities. Late applicants will be awarded on a funds available basis. Application materials cannot be accepted after the student’s last date of attendance.

Important information:

Banner III #: ________________________
Department of Education PIN #: ________________________
My Email Address: ________________________
WIB addresses: ________________________
________________________
________________________
GETTING STARTED

Capital Community College is participating in a pilot project with the System Office of the Connecticut Community Colleges to encourage students to electronically apply for student financial aid. Our effort supports the activities of the U.S. Department of Education in making electronic delivery of student financial aid a reality for all students. We hope to improve our services to students and assist you in completing the financial aid process.

Important – You do not have to own a personal computer to participate in this project or to apply for financial aid from Capital Community College. However, you do need to have use of a computer with Internet access. Many public libraries, high schools, adult education centers and community centers offer free access to students. Also, you have access to many of the computers available for student use at Capital Community College. These computers are available for use at the Welcome Center, Financial Aid Office, Library and Learning Center.

To participate in this electronic pilot project, you must have a basic understanding of a personal computer and Internet use. If you can’t, please contact us at the Welcome Center (520-7010) or the Financial Aid Office (520-7272).

Step 1
Getting an e-mail address

It is essential that you possess an e-mail address to participate fully in this endeavor. If you do not already have a personal e-mail address, you can obtain one for FREE at many web sites on the Internet. For example, both Yahoo! (www.mail.yahoo.com) and MSN Hotmail (www.hotmail.com) provide e-mail services for free.

You will provide your e-mail address to both the U.S. Department of Education and Capital Community College, and both of us will communicate with you about your financial aid application by sending information to your e-mail address.

By the way, you can get an e-mail address in just a few minutes. Just follow the above step.

Step 2
Applying for a PIN
(Personal Identification Number)

It is important that you apply for a PIN. For the 2002-2003 Award Year, you can obtain a PIN electronically by going to the government’s PIN site (www.pin.ed.gov). If you are not sure whether or not you have a PIN already, you can go to the same web site to check. Now that you have an e-mail address, the Department of Education will e-mail you directions as to how to obtain your PIN from a secure web site. Allow 3 days to secure your PIN from here.

Your PIN serves as your password to access private information on the U.S. Department of Education’s web site. You can also use your PIN as an electronic signature when completing your FAFSA on the Web.

Step 3
FAFSA on the Web

To apply for financial aid from Capital Community College you must complete the Free Application for Federal Student Aid (FAFSA). You will be asked what you need to fill out the FAFSA?

You will need records for income earned in the year prior to when you will start school. You may also need records of your parent(s)’ income information. For the 2002-2003 school year, you will need 2001 information. You will need to refer to:

- Your Social Security card and driver’s license
- W-2 Forms or other records of income earned
- Your (and your spouse’s, if you are married) Federal Income Tax Return
- Your parent(s)’ Federal Income Tax Return
- Records of other unearned income such as welfare benefits, social security benefits, TANF, veteran’s benefits, or military or clergy allowances
- Current bank statements and records of stocks, bonds, and other investments
- Business or farm records, if applicable
- Your alien registration card (if you are not a U.S. citizen)

On the FAFSA Form in Step six, you must enter Capital Community College’s School Code Number. Enter 007635 to ensure your application information is provided to Capital Community College.

Since you have a PIN, you can sign your application electronically. If your parent(s) is required to sign the application, your parent(s) can obtain a PIN by following Step 2 is indicated previously. By filing this electronic application, you are applying for federal, state and college financial aid. This electronic application process takes 45 minutes to 1 hour to complete. If you provide the Department of Education with your e-mail address, you will be notified when the results from your application are available to you at a secure website.

Step 4
Using Online

The Student Information System

Now that you’ve applied for financial aid from the U.S. Department of Education and Capital Community College, you must complete the Free Application for Federal Student Aid (FAFSA). You will be asked what you need to fill out the FAFSA?

You will need records for income earned in the year prior to when you will start school. You may also need records of your parent(s)’ income information. For the 2002-2003 school year, you will need 2001 information. You will need to refer to:

- Your Social Security card and driver’s license
- W-2 Forms or other records of income earned
- Your (and your spouse’s, if you are married) Federal Income Tax Return
- Your parent(s)’ Federal Income Tax Return
- Records of other unearned income such as welfare benefits, social security benefits, TANF, veteran’s benefits, or military or clergy allowances
- Current bank statements and records of stocks, bonds, and other investments
- Business or farm records, if applicable
- Your alien registration card (if you are not a U.S. citizen)

On the FAFSA Form in Step six, you must enter Capital Community College’s School Code Number. Enter 007635 to ensure your application information is provided to Capital Community College.

Since you have a PIN, you can sign your application electronically. If your parent(s) is required to sign the application, your parent(s) can obtain a PIN by following Step 2 is indicated previously. By filing this electronic application, you are applying for federal, state and college financial aid. This electronic application process takes 45 minutes to 1 hour to complete. If you provide the Department of Education with your e-mail address, you will be notified when the results from your application are available to you at a secure website.

Step 5
Your Financial Aid Award

When we complete our review of your financial aid application, we will notify you at your e-mail address and direct you to the Online student information system. You will be able to view your Financial Aid Award and make decisions about your awards over the Internet. We will assume that you want to accept any grants (free money) that you are eligible for, but there may be additional awards (like student loans or work-study jobs) that you have the option to accept or decline.

By using Online, you can view and adjust your financial aid awards, complete award requirements, and e-mail the financial aid office with your questions and concerns. You can use this student information system to keep track of the status of your financial aid application.

To use this system, you need to know your Banner ID number and Banner PIN (this PIN is different from your U.S. Department of Education PIN mentioned earlier). When you apply for admission to Capital Community College, you were given these numbers. Your User ID is the @ sign followed by your 8-digit student number (for example: @2345678, 8). Your initial PIN is your date of birth in the format month/day (for example: 01/082). You will be asked to change your PIN when you first login. If you don’t remember your Banner ID number, you must contact the Registrar’s Office at Capital Community College to get this information.

In addition to being able to track your financial aid application online, you will be able to download any documents you may need to complete your application requirements. You can then print out these documents and either mail or drop them off at the financial aid office. To inform you of your application status, we will periodically e-mail you and direct you to visit the Online system to check your list of missing documents. You should make sure you log into the Online student information system weekly to stay current with your financial aid information and news.
Financial Aid

Instructions & Electronic Filing for 2002-2003 Academic Year

860.520.7827
FAFSA: 860.520.7906
Email: CA-FinAidHelp@ccc.commnet.edu

Please Read Carefully
The purpose of this instruction sheet is to provide you with the necessary information you need to successfully complete the financial aid application process. We want to be sure that you receive all the financial aid for which you are eligible. Please contact us if you have any questions. We are here to assist you! You can e-mail us at CA-FinAidHelp@ccc.commnet.edu

Student’s Responsibility
Capital Community College expects the student to initiate the application process in a timely manner, and considers it the student's responsibility to complete all required steps as outlined in this guide.
Did you know……

- 85% of CCC’s financial aid applicants applied for financial aid on the web
- 70% of these applicants are self-supporting students
- 88% are less than 40 years old
- 74% are members of a minority group
- 74% are female
- 88% have an annual income < $53,935
- 40% have a 0 EFC

Connecticut Community Colleges

*Education That Works For a Lifetime*
Technical Elements of Web-based System.....

- Electronic Mail
- PINs
Electronic Mail....

- Student e-mail address is essential
- E-mail address is imported from ISIR and stored in database
- Enhanced communications with students
PINs....

- Department of Education PIN available at pin.ed.gov
- Banner web self-service User ID & PIN

Connecticut Community Colleges

Education That Works For a Lifetime
Technical Elements of Web-based System.....

- FAFSA on the WEB
- Banner Financial Aid System
- Banner web self-service – Online.commnet.edu

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Education That Works For a Lifetime
Technical Elements of Web-based System.....

- SCT Banner
  XtenderSolutions™ - document imaging
- Future enhancement

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Education That Works For a Lifetime
Development Modules.....

- Business Process(es) Modeling
- Application and Document Tracking
- Award Policies and Practices
- Communication with Students

Connecticut Community Colleges

Education That Works For a Lifetime
Module Training Dates.....

<table>
<thead>
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<th>November 2002</th>
<th>December 2002</th>
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</thead>
<tbody>
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<td>S   M   T   W   T   F   S</td>
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<tr>
<td>27  28  29  30  31  1  2</td>
<td>1   2  13  4   5   6   7</td>
</tr>
<tr>
<td>3   4   5   6   7   8   9</td>
<td>8   9  10  11  12  13  14</td>
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<td>10  11  12  13  14  15  16</td>
<td>15  16  17  18  19  20  21</td>
</tr>
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<td>17  18  19  20  21  22  23</td>
<td>22  23  24  25  26  27  28</td>
</tr>
<tr>
<td>24  25  26  27  28  29  30</td>
<td>29  30  31  1   2   3   4</td>
</tr>
</tbody>
</table>

Connecticut Community Colleges

Education That Works For a Lifetime
Business Process(es) Modeling……

Develop & operate business processes that span multiple applications and business partners, both behind the firewall and over the Internet…...
Business Process(es) Modeling.....

Accept/decline awards on the web

Work-study awards

Electronic delivery system

Electronic applications

Tracking groups

Electronic loans

Academic progress

Brochures & posters

workshops

Mail.com

Connecticut Community Colleges

Education That Works For a Lifetime
Application & Document Tracking.....

- Encouraged web applications – 85% of CCC applicants using FOTW
- Eliminated college application for financial aid

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Education That Works For a Lifetime
Application & Document Tracking.....

- CCC established electronic documents for students to "download" from Online
- Eliminates need for "tracking letters" and enclosures
- 24/7 student access to materials

Connecticut Community Colleges

Education That Works For a Lifetime
Did you know … …

60% of CCC’s financial aid applicants have used Online!
Student Requirements

Aid Year: 2002-2003 Award Year

Depending upon your student status and our review of your application material, you may need to submit other materials to the financial aid office or take certain actions. Any requirements you have yet to meet are listed under Outstanding Requirement(s). If an Outstanding Requirement is underlined in blue, a hyperlink exists for that item. Click on the hyperlink to download a copy of the document or to be taken to another web page. You need Adobe Acrobat Reader software to view and print any document. You can obtain a free copy of the Adobe Acrobat Reader software by clicking on the icon below. Be sure to submit any requested documents to the financial aid office promptly.

Click here to download a FREE copy of the Adobe Acrobat Reader software

<table>
<thead>
<tr>
<th>Outstanding Requirement(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Verification Worksheet 2002-03</td>
</tr>
<tr>
<td>Signed copy of Student's and Spouse's 2001 Tax Form</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completed Requirement(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional Student Information Record</td>
</tr>
</tbody>
</table>
2002-2003 Verification Worksheet
Federal Student Aid Programs

Your application was selected for review in a process called “Verification.” In this process, your school will be comparing information from your application with signed copies of your (and your spouse’s, if you are married) 2001 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you may need to send in corrections on your Student Aid Report (SAR), or your school may send corrections electronically, to have your information reprocessed.

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won’t be delayed. Your financial aid administrator will help you.

A. Student Information

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>M.I.</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (include apt. no.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>ZIP code</td>
<td>Date of birth</td>
</tr>
<tr>
<td>Phone number (include area code)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

B. Family Information

List the people in your household, include:
• yourself, and your spouse if you have one, and
• your children, if you will provide more than half of their support from July 1, 2002 through June 30, 2003, and
• other people if they now live with you, and you provide more than half of their support and will continue to provide more than half

What you should do
1. Collect your financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Fill in and sign the worksheet.
4. Take the completed worksheet, tax forms, and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compile information on the documents. You may need to make corrections on your SAR and send it back to the application processor.

Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668).
Capital Community College

Student Requirements

Aid Year: 2002-2003 Award Year

Depending upon your student status and our review of your application material, you may need to submit other materials to the financial aid office or take certain actions. Any requirements you have yet to meet are listed under Outstanding Requirement(s). If an Outstanding Requirement is underlined in blue, a hyperlink exists for that item. Click on the hyperlink to download a copy of the document or to be taken to another web page. You need Adobe Acrobat Reader software to view and print any document. You can obtain a free copy of the Adobe Acrobat Reader software by clicking on the icon below. Be sure to submit any requested documents to the financial aid office promptly.

Click here to download a FREE copy of the Adobe Acrobat Reader software

Outstanding Requirement(s)
Entrance Loan Counseling Session

Fund required document!

Completed Requirement(s)
Independent Verification Worksheet 2002-03
Signed copy of Student's and Spouse's 2001 Tax Form
Institutional Student Information Record
Welcome to Stafford Entrance Counseling

Why You're Here

Before you get your Federal Stafford student loan, you are required by federal regulation to complete an entrance counseling session. It shows you how to manage your student loans, both during and after college.

Here's the best part: You can do the counseling online, in about 25 minutes right from this page if your college participates in Mapping Your Future's Online Student Loan Counseling. How do you know if your school participates? Start through the steps below to find out.

(Before you do, make sure you're supposed to be here and not in Perkins Entrance Counseling for your Perkins Loan. Ask your Financial Aid Office if you're not sure.)

Before You Start

Gather the following information, if you don't have it already:

- Your Social Security number
- Your driver's license number
- Name, address, and phone number of your closest relatives
- Any other identifying information you might have

Help
Did you know.....

CCC students “downloaded” from Online.....

- 837 Verification Worksheets
- 141 Low-Income Verification Documents
Award Policies & Practices

- Increased use of automated batch packaging
- Federal work-study awards offered to those applicants indicating desire on FAFSA
- Stafford loans offered to applicants in nursing degree program only
- Online content for “Terms & Conditions” and “Satisfactory Academic Progress”
- Designed to test Online award accept/decline features
Award Information

- Account Summary By Term
- Award By Aid Year
- Accept/Decline Award Offer by Aid Year
- Award Payment Schedule
- Award History
- Student Loan Application Information and History
- Student Employment Information
### Award Package By Aid Year

#### Aid Year: 2002-2003 Award Year

This is a summary of your financial aid award package for the selected aid year. **If an award fund is underlined, it denotes a "hyperlink" to more detailed information. For example, a "Federal Work-Study" award "hyperlink" will bring you to a comprehensive Student Employment Information page.** Your financial aid award is based upon your enrollment each term as a full-time student. Your award may be adjusted if you enroll on a less than full-time basis. All financial aid awards are contingent upon adequate funding, your completion of all outstanding requirements, and your enrollment and attendance at the college. Awards are not paid to your student account until you meet all eligibility requirements. Federal regulations require you to repay any Title IV Student Financial Aid you may receive if you do not attend at least 60% of the term.

**IMPORTANT! Click Here** to learn more about the terms and conditions of your financial aid award.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Status</th>
<th>Amount</th>
<th>Paid to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Work Study</td>
<td>Offered</td>
<td>$3,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>Accepted</td>
<td>$4,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Federal Stafford Loan</td>
<td>Offered</td>
<td>$2,625.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$9,625.00</strong></td>
<td><strong>$0.00</strong></td>
</tr>
</tbody>
</table>
Accept Award Offers by Aid Year

Aid Year: 2002-2003 Award Year

- If you want to accept the full amount of all awards you are being offered, click the "Accept Full Amount of All Awards" button below.

- If you want to decline at least one fund award or you want to only accept a portion of a fund award, use the following table. Click the Accept or Decline option from the pull-down list under the "Accept/Decline/Decide Later" column for each award you want to accept or decline in full.

- To accept only a portion of an award you are being offered, click the "Accept" option in the pull-down list under the "Accept/Decline/Decide Later" column and enter the partial amount in the "Accept Partial Amount" column. Then click the "Submit Changes" button to submit all changes.

![NOTE!]

IMPORTANT! [Click Here](#) to learn more about the terms and conditions of your financial aid award.

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<td>Federal Stafford Loan Sub</td>
<td>Offered</td>
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<td>Decide Later</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$9,625.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Now that you have been offered financial aid, you must read this document to learn about the terms and conditions of your awards, your responsibilities as a financial aid recipient, and the procedures you need to take in activating your various financial aid awards.

Terms & Conditions: In general, your financial aid award is based upon your attendance at the college as a full-time student for a full academic year. Full-time enrollment is based upon 12 or more credit hours each term. If you enroll for less than a full academic year or less than 12 credits per term, your financial aid award will be adjusted. Your financial aid award may also be adjusted for your withdrawal from classes or the college, a change in your eligibility, or a change in the financial aid funding available to the college. Capital Community College reserves authority to adjust your financial aid award at any time to ensure proper compliance with all college, state, and federal regulations.

Your Responsibilities: As a financial aid recipient at the college, you must be accepted and remain enrolled in an eligible certificate or degree program. You must also maintain satisfactory academic progress in your program of study. Click here for additional information.

You must notify the financial aid office of any scholarships, grants, or other assistance awarded to you from any sources other than Capital Community College. Your withdrawal from the college may result in your having to repay the federal financial aid paid to you so be sure to consult with the financial aid staff before withdrawing from all your classes.
Standard For Academic Good Standing, Satisfactory Academic Progress, & Duration Of Eligibility For Aid For Financial Aid Recipients

Effective July 1, 1994, federal regulations established a new minimum for satisfactory academic progress. In order to be eligible for federal, state, or institutional financial assistance from Capital Community College, a student must be in "academic good standing" and be making "satisfactory academic progress" to be determined at the end of each semester in accordance with the standards defined below. Students who currently are not receiving financial aid should be aware of the need to be maintaining "satisfactory academic progress" and be in "academic good standing" before they are eligible to apply for financial assistance.

It is important to note that in determining a student's progress toward a degree or certificate, the college is required to evaluate the entire academic performance at CCC not merely the progress achieved while receiving the benefit of student financial aid.

Students who add, drop and/or withdraw from a course(s) resulting in a change of enrollment status (full-time, 3/4 time, and 1/2 time) may be subject to an adjustment of their financial aid award. Withdrawal from a course(s) after the add/drop period will be considered in the assessment of credits attempted and may jeopardize satisfactory progress.

Academic Progress
Satisfactory progress is a progression to the successful academic completion of course requirements for a degree or certificate by maintaining a minimum cumulative point average (CPA) and successfully completing at least 67 percent of credits attempted on a cumulative basis.

Content is within Online.
Communication with Students.....

“push” students to ONLINE through both print and electronic sources

www.Online.commnet.edu

ONLINE provides a secure site for financial aid transactions

Connecticut Community Colleges

Education That Works For a Lifetime
Communication with Students…..

- In the “traditional” FinAid Letter Generation process, CCC added a reference to Online to each tracking & award letter.
- These letters were mailed to students not having an e-mail address in Banner.

Connecticut Community Colleges

Education That Works For a Lifetime
Communication with Students.....

You may view and update your financial aid application and award status at the college’s Online system 7 days a week, 24 hours a day. Just go to www.online.commnet.edu and log onto the “secure” website by using your Banner ID (which is located above) and PIN (personal identification number).
Communication with Students.....

- We developed a modified electronic FinAid Letter Generation process for CCC using Banner & MS Exchange Server
- The process involves the use of multiple Exchange e-mail accounts and public folders
Communication with Students

- The FinAid Letter Generation process automatically sends an electronic message to those students with an e-mail address in Banner instead of a printed tracking or award letter.
- E-mail messages “push” students to Online.
- Log of electronic messages is maintained in RUAMAIL.
Thank you for applying for financial aid from Capital Community College.

This is an automatic e-mail notification being sent to you from the college's student information system. This notification is to prompt you to visit the College's Online information system at http://www.online.commnet.edu to monitor your financial aid application and award status. Please take whatever actions may be indicated.

To use Online you need your Banner ID number and your Banner PIN (Personal Identification Number). If you don't remember your Banner ID number, you must contact the Registrar's Office at Capital Community College to get assistance.

**PLEASE DO NOT RESPOND TO THIS E-MAIL.** For financial aid questions e-mail CA-FinAidHelp@ccc.commnet.edu. You can update your e-mail address at www.online.commnet.edu.

Any replies get automatically forwarded to the FinAid Help address!

Message is generated from Banner but appears to come directly from you!
Did you know.....

During this year, CCC has “mailed” 6278 letters – 63% electronically!

- Of 4625 “tracking” letters, 2778 or 60% have been e-mailed
- Of 1653 “award” letters, 1158 or 70% have been e-mailed
Benefits of a Web-based Financial Aid System.....

- Significant reduction in documents maintained in the office –
  - No college financial aid application
  - No Award Letter
  - No paper file folder created for 2/3 of students

Connecticut Community Colleges

*Education That Works For a Lifetime*
Benefits of a Web-based Financial Aid System……

Reduced mailing & associated costs –
✓ Stationery
✓ Staff time
✓ Reduced postage cost by $1,500
✓ Office supplies (e.g. toner)
Benefits of a Web-based Financial Aid System.....

- Enhanced availability of services to students – 24/7 “virtual” office
- Increased levels of satisfaction of financial aid services among students, colleagues, and management
- Created an interactive technology environment for our college and employed 21st Century higher education business practices

Connecticut Community Colleges

Education That Works For a Lifetime
Delivery Calendar.....

- November 5 – Business Process(es) Modeling
- November 12 – Application & Document Tracking
- November 19 – Award Policies & Practices
- December 3 – Communication with Students
- December 17 – Testing
- January 2003 – New Year Banner Release; start of 0304 AY processing
THANK YOU!

Connecticut Community Colleges

Education That Works For a Lifetime