

WWWF Action Form

| What | Who | When | Follow-up (Check up or Check back) |
|--|--|--|---|
| Review option of automating schedule of upload procedures | Rose | TBA | |
| Identify Best Practices for scanning documents at intake (ie. Call schools, visit schools, contact scanner product venders). Meet to make a decision. | ? Director assign | ASAP and no later than March 16 | Anita |
| Define naming format for scanned file (track code last name SS####, i.e. 02smith4589) | Director, Front Desk, Lean Team Evaluators | March 8 | Brandi |
| Train Intake Specialist (title open for discussion) to email first notification letter, as well as send a hard copy until electronic system is fully implemented. | SBCTC Technology Support | Propose April 20 | Director or Dean |
| Train Intake Specialist & all staff on scanning documents and attaching to FAM student files. | Brandi & IT Support | Propose implement with 2011-2012 FAFSA files | Rose |
| Until Electronic System: Intake Specialist make folders when data sheet is received. Label printed from FAM. <u>DO NOT</u> print ISIR. Make quality check of the data sheet being complete. If not received in person and data sheet is incomplete contact student via email or form letter. | Cindy LaBlue, SBCTC Technology Support | March 4 | Tammy |

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| All data sheets received in a day are filed that day in the closet in order receive. File sheet of files ready to work on by Evaluators is saved on "G Drive". Keep old file sheets for reference. | Cindy La Blue | March 4 | Tammy |
| File targets set based on Evaluators handling a file from the beginning (data sheet received) to packaged and loan certification awarded (award letter sent). | Director | March 8 | Lean Team |
| Evaluators use Professional Judgment to handle appeals for their student. | Director | March 8 | Lean Team |
| Evaluators pull files from the closet as the first in to be processed (eventually the closet will be FAM files virtual). Need to add lock on closet for security. | Anita | March 8 | Paula |
| Define system to document hours of Evaluators spent on other task, not processing files. Recommend adding notes to a comment section on the printed list of files sign out sheet (i.e. 3 hours to reconcile work study account). | Director | March 8 | Lean Team |
| Request FA Portal to add a menu list or note section to encourage students to scroll down to the lower part of the screen | Director/Dean | March 1 | Lean Team |
| Set student terminals in waiting area to have FA page as the opening page. EvCC Help Desk Request | Director/Dean | March 1 | Paula |

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| Change generic log-in on front counter computers to give access to "G Drive" to store scanned documents. ECC Help Desk Request | Director/Dean | March 1 | Anita |
| Educate students on FA and Cashier functions with signs in the office and check list on website. | Tammy/Brandi Content Editor for the website | March 4 | Lean Team |
| Add instruction sheets on how to access the FA Portal taped to the table next to the student terminals in the waiting area. | Paula | March 4 | Lean Team |
| Add FA welcome page links to key department websites (i.e. Admissions, Preparing and Planning, Cashier, Colleges, etc.). Potential list of sites provided. | Dean and Content Editors for websites | March 8 | Lean Team |
| Online writable PDF submission forms, submitted to fin-aid generic account. | Dean/Director, EvCC IT Support | March 8 | Lean Team |
| Direct Deposit | Dean/Director/Business Office Director | March 8 | Lean Team |
| Data sheet reformatted to ensure easy scanning and only have them online, not paper copies. | TBA – Evaluator/Intake Specialist | | Director |
| Letter templates | TBA- Evaluator/ Intake Specialist | | Director |

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| Review hold purpose and process. Funds not paid as of 2/23/2011 and assumed on hold are \$216,500 for current quarter. | TBA | | |
| Evaluate the value and purpose of removing debt to produce the FA check and then adding the debt back on to the account. | TBA | | |
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