

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: *Financial Aid*

Unit Contact Name: *Courtney Rust*

Date: *7/17/2024*

Phone: *315-267-2848*

Email Address: *rustca@potsdam.edu*

Assessment Year: *2023-2024*

PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made. Units should select a goal that has not yet been reported on during the '22-'26 cycle.

Selected Goal

Ensure staff are knowledgeable of all sources of aid available in order to best educate students and maximize their funding options.

Desired Outcomes/Objectives

3A. NSLDS Training within the next two months – Provide training to staff to develop better knowledge and understanding of the NSLDS website to better assess student aid eligibility. 3B. COD training by the end of the spring term – Provide training to staff to better familiarize them with the COD web site and make sure they are familiar with confirming that specific aid requirements have been completed by students and/or families. 3C. Provide Banner training on daily processing activities, such as tasks to reinstate lost aid due to SAP issues, or adjusting aid for a student who has a mixed status (undergraduate in the fall/graduate in the spring).

Related Targets/Measures

3A. Method – FSA Assessment – Work collaboratively to decide which of the 15 FSA Assessments we will complete from the FSA Partners web site. We will select one FSA Assessment per year that we will complete collectively as an internal audit to assess our training outcomes. 3B. Method – NASFAA Pop Quizzes – Have staff try to answer the NASFAA pop quiz question that falls on the day of our staff meeting. Then, at the meeting review the Pop Quiz question for the day as a group to discuss what the correct answer is, and why. 3C. Method—Obtain direct staff feedback and input weekly. Regularly meet with staff in training to answer any questions and discuss Banner and aid-related questions they are encountering.

NOTE: Once completed, administrative unit leaders should submit this form to their direct supervisor for review and approval. Supervisors, upon approving the form, should submit it to the assessment committee via email at adminassessment@potsdam.edu for their review.

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

Our main focus this year was learning financial aid all over again in the new era of FAFSA simplification. Not only did we have to update our policies, procedures, and banner to accommodate this; we also had to train and re-learn all federal financial aid to ensure we are helping our students properly and remaining in compliance. To do this we participated in many trainings offered by Federal Student Aid (FSA), National Association for Federal Student Aid (NASFAA) and New York State Financial Aid Association (NYSFAA)

**Better FAFSA Better Future Overview and Timeline 6/6/23
Protecting Federal Tax Information (FTI) at Your Institution 6/8/23
ISIR vs ISIR 6/13/23
Professional Judgement, Dependency Status, and Verification 6/15/23
Better FAFSA Better Future Q/A Session 1 6/20/23
Student Aid Index (SAI) Part 1 6/22/23
Student Aid Index (SAI) Part 2 6/27/23
Pell Minimums, Maximums and In Between 7/6/23
The FAA's Role in FAFSA Simplification 7/11/23
Better FAFSA Better Future Q/A Session 2 7/13/23
2425 FAFSA Demonstration 8/17/23
StudentAid.gov Account Creation Process for Users Without an SSN 11/2/23
Better FAFSA Better Future Q/A Session 1 1/18/24
Better FAFSA Better Future Q/A Session 2 2/22/24
Demo of FAFSA Partner Portal Correction 6/28/24
Robert Weinerman FAFSA Simplification Part 1 9/29/23
Robert Weinerman FAFSA Simplification Part 2 10/26/23
Duane Morris Financial Value Transparency (FVT) & Gainful Employment (GE) 10/31/23
Robert Weinerman Taxes Part 1 11/6/23
Robert Weinerman Taxes Part 2 1/18/24
Return to Repayment 11/17/23
Borrower Defense & Repayment 2/1/24
2425 Verification 2/21/24
2425 FAFSA Update NASFAA 1/24/24
Policy Update and Final FAFSA Countdown 12/13/23**

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Policy Update FAFSA Simplification 9/20/23

The Supreme Court Speaks: Understanding the Implications of Race-Conscious Admission Decision 7/19/23

In addition to all the trainings from our memberships, we meet weekly every Thursday from 2-3 to conduct trainings on a process or go over questions from processing for the week. We covered topics such as multiple record review, year in college, and re-packaging. We also meet monthly, every first Wednesday of the month, to go over events for the upcoming month, training topics we may need to cover and assess how the office is running in the One Stop space.

We were not able to complete an assessment on a 23-24 task just yet. Our cycle for 24-25 was condensed into a couple of months rather than 7-8 months and that has been all time consuming to service our students.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

Once we trained on all the topics and learned the new policies for FAFSA simplification we updated all our policies and procedures from 10/23-1/24 essentially. We still have updates we are making regularly as new things arise or we further understand the topics. Once all Ellucian patches were received in 3/24 we worked on updating all our banner system to accommodate the changes to load the new FAFSAs for the month of April 2024. On 5/7/24 we added all updated forms to our website that accommodated the FAFSA simplification changes.

We will complete an assessment of one task from 2324 by 10/31/24. Our plan to do this is to pick one of the self assessment tools from NASFAA and complete the data in it to see how the task went. I expect it to be in compliance. We will complete an assessment of 2425 items at the end of the Fall 2024 semester, 12/31/2024. We plan to do self assessment on Pell to see if the awards were done correctly with Pell intensity changes. I expect we will have one or two awards that may need to be fixed if banner did not work as expected with the new set up.

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SECTION 2: DATA INFORMED DECISIONS & UNPLANNED ASSESSMENT (OPTIONAL, BUT VALUABLE)

When we were working with our programmer to update our FAFSA load and packaging reports for FAFSA simplification we found some of our reports had not been updated since the 90s! We found it hard to truly piece together why these reports were used and the purpose since they were so old. They were never updated for any changes throughout the years and this big one of FAFSA Simplification showed us we need to keep reports updated on a yearly basis. It took us longer than others because we had to make changes that weren't even FAFSA simplification related necessarily to get them having a valuable purpose for this new change. We will be adding to our calendar of projects to make sure we update each year for new processes, new needs, new fund codes, etc. The technology piece of financial aid is too important to not keep fresh and up to date to award funds to our students.

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