


KASF AA Spring Conference
April 27-29

“KEEPING UP WITH THE JONESES”

USING TECHNOLOGY IN THE FAO TO OPTIMIZE STAFF



Keeping Up with the Joneses
During A Recession

"Jones, how about a mortgage on keeping up?
Our budget is a bit tight this year."

Possible Cons

- Expensive
 - Software
 - Hardware
 - Training
 - Extra Staff
 - Dedicated Staff
- Time-consuming
- Unnecessary

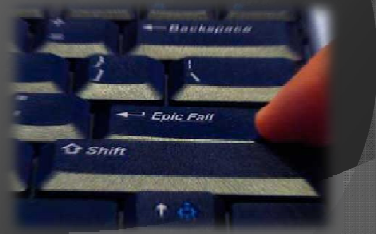
Possible Cons

- Lack of Buy-In
 - Staff
 - Students
- Upkeep

Possible Pros

- ◉ Streamlines Processing
- ◉ May Actually Save Money
- ◉ Recruitment/Retention
- ◉ Quality Service
- ◉ May Help with Compliance

Overview of Common and More Easily-implemented Tech Enhancements



Email

- ◉ Award Notifications/Revisions
- ◉ Student Loan Right to Cancel
- ◉ Professional Judgment Consideration
- ◉ Others?

Receiving/Maintaining Documents

- Document Imaging
 - Workflows
 - If your document imaging system includes workflow functionality, consider scanning documents at intake and creating process workflows for specific items (verification docs, c flag resolution docs, etc.).
 - Barcoding
 - If you use a merge process for your letters, consider adding merge fields and converting them to barcode font – this is a great way to scan/image documents to a student file without manually linking.

Automation/Scheduling

- Application Scheduling Software
 - Particularly beneficial for institutions with ERP systems (AppWorx, Tidal)
 - Automate processes (dataload, awarding, disbursement, etc.)
 - Keys to Success in process automation: continual review of output and maintenance
 - Can manually control pre-determined job sequences or schedule the sequence

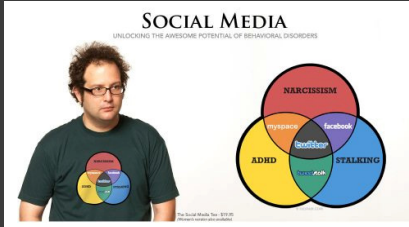


Automation/Scheduling

- Does your reporting software (MS Reporting Services, Crystal Reports, etc.) have timing functionality? If so, consider scheduling regularly requested reports.
 - Over award reports
 - Outside resources
 - Withdrawals
 - Etc.

Social Media

- Facebook
- Twitter
- Consider Best Practices Carefully



Hardware Considerations

- Dual Monitors or Large Monitors
- High Capacity Network Printers
- Autofolder/Inserter Machines
- Scanners
- Others?

Software Considerations

- Before Purchase
 - Check your existing software
 - Ask your IT department
- Do you know what your FAMS can do?
 - User-defined fields

Utilize Help

- ◉ Google is your friend
 - Searching for “Word help” will provide you Microsoft’s website on Word how-to’s
- ◉ How-to-Geek (howtogeek.com)
 - Has just about anything you want to know about certain technologies (Windows 7, Office, Blogging, Android, etc.)
- ◉ You-tube
 - Can provide helpful how-to’s
- ◉ Your FAMS vendor

Some Freebies

- ◉ Teamviewer
 - Free tool for remote desktop and online presentations
- ◉ Bullzip PDF Printer
 - Free tool to create PDFs – acts as a printer
- ◉ Microsoft Visual Studio
 - If you have the gumption to program, you can make any Microsoft office program do what you want it to do using this embedded developer
- ◉ Adobe
 - It’s not free – but it does have a handy tool to compare two PDFs – helpful with reports

Talk Amongst Yourselves

I’ll give you two topics:
Facebook – it’s neither face, nor book.
Youtube – it’s neither you, nor tube.
Discuss!