



Back to Basics Workshop Agenda Financial Aid



Session Logistics	Financial Aid Workshop
Session Date	October 24-26, 2018 (Wednesday – Friday)
Location	TBD
Participants	Financial Aid staff and leadership, IT staff supporting Financial Aid
Facilitators	Jerry Martinez, Senior Consultant, Banner Financial Aid Specialist Tim Woltering, Senior Consultant, Process Specialist
Session Requirements	<ul style="list-style-type: none"> • 2 large Post-It Flip Chart pads, stands, markers, & wall space to post charts • Name tents for participants • Projection system for PowerPoint presentation and access to Banner Test

Wednesday 10/24 Financial Aid Best Practices	
8:30-8:45 am	Welcome and Introductions
8:45-9:15 am	Review of Survey Data
9:15-12:00 pm Break 10-10:15	High Level Business Process Review and Identify Opportunities for Improvement <ul style="list-style-type: none"> • Topics (<i>order presented and discussed may change</i>): <ul style="list-style-type: none"> ○ Data Load & Tracking ○ Common Matching ○ Requirement Tracking ○ Verification ○ Fed & State Application Award ○ Scholarship Processing & Award ○ Loan ○ Transfer Monitoring
12:00-1:00 pm	Lunch
1:00-4:00 pm Break 3-3:15	High Level Business Process Review and Identify Opportunities for Improvement <ul style="list-style-type: none"> • Topics (<i>order presented and discussed may change</i>): <ul style="list-style-type: none"> ○ Title IV Authorization ○ Disbursement ○ Reconciliation ○ Student Employment ○ Academic Progress (SAP) ○ Return of Title IV Funds ○ FISAP
4:00-4:30 pm	Prioritize Opportunities and Identify 'Quick Wins' Confirm Topics for Thursday-Friday Wrap-Up

Thursday 10/25 Financial Aid Consulting	
8:30-8:45 am	Set Agenda for the Day
8:45-12:00 pm Break 10-10:15	Banner Consulting Topics TBD
12:00-1:00 pm	Lunch
1:00-4:15 pm Break 3-3:15	Banner Consulting Topics TBD
4:15-4:30 pm	Review Accomplishments and Wrap-Up for the Day



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Friday 10/26	Financial Aid Consulting
8:30-8:45 am	Set Agenda for the Day
8:45-12:00 pm	Banner Consulting
Break 10-10:15	Topics TBD
12:00-1:00 pm	Lunch
1:00-4:15 pm	Banner Consulting
Break 3-3:15	Topics TBD
4:15-4:30 pm	Review Accomplishments and Wrap-up for the Onsite Visit