


# Campus Collaboration

It may be cheesy, but doesn't teamwork  
make the dream work?





# UNC Charlotte

## UNC Charlotte Campus Collaboration

- ❖ Creating an Atmosphere of Collaboration
- ❖ 'But, but... Federal Regulations!'
- ❖ Getting a Seat at the 'Big Table'
- ❖ The Benefits and Pitfalls of a One Stop Shop



# Queens University of Charlotte

Context → small (2,500ish), private,  
moderately selective institution

- ❖ Student Accounts Office
  - ❖ Student Accounts and Financial Aid under “Student Financial Services” - Enrollment Management division
  - ❖ Bi-weekly team meetings
  - ❖ Shared drive and folders for things like disbursement files
  - ❖ Integration of PowerFacts and Jenzabar with FA view in JZ for Student Accounts team
  - ❖ Refund process checked by both offices
  - ❖ Quarterly cross-trainings
  - ❖ Annual review of process improvement

# FA view for Student Accounts team

## PowerFAIDS\* Documents

Tracking Status:

Financial Aid Counselor:

Document	Required For	Status	Date
ISIR (FAFSA Results)	Packaging	Received	12/03/2021 03:31:40 PM
Loan Entrance Counseling		Received	10/10/2022 12:00:00 AM
Direct Loan Master Promissory Note		Received	08/26/2022 12:00:00 AM
Direct PLUS Loan Master Promissory Note		Received	10/11/2022 12:00:00 AM

## PowerFAIDS\* Awards

	FM	
Budget:		58,096.00
Family Contribution:		11,637.00
Need:		46,459.00
Unmet Need:		.00
Need Based Aid:		46,459.00

Fund ID	Fund Name	Amount	Status	Created Date	Modified Date	Sched Disb Amount
9257	FWS	1,700.00	Accepted	03/14/2022	00/00/0000	850.00
9359	QUCollegia	10,900.00	Accepted	03/14/2022	09/14/2022	5,450.00
9443	TExchange	18,130.00	Accepted	03/14/2022	09/14/2022	9,065.00
9457	DL_SUB	3,500.00	Accepted	03/14/2022	10/12/2022	1,750.00
9458	DL_UNSUB	2,000.00	Accepted	03/14/2022	10/12/2022	1,000.00
9459	DL_PLUS	11,866.00	Accepted	10/07/2022	10/11/2022	5,933.00
9506	Univ Schol	10,000.00	Accepted	03/14/2022	09/14/2022	5,000.00
	Tot Award Amt:	58,096.00				29,048.00

# Eyes on a refund

- ❖ In addition to regular census, audits, safety-nets...
- ❖ When credit balance occurs, Student Accounts looks through each one and highlights any that seem out of the norm
- ❖ Reviewed by FA to ensure Title IV and institutional funding is accurate
- ❖ Prevents over-award of institutional funding

# Areas of heavy collaboration

- ❖ Information sharing
  - ❖ Satisfactory Academic Progress (SAP)
  - ❖ Account holds and late fees
  - ❖ Return to Title IV (R2T4)
- ❖ Co-working
  - ❖ Financial clearing for enrollment
  - ❖ “Swapping” of funds
  - ❖ Veteran benefits
  - ❖ Outside scholarships and third-party billing

# Rhodes College



Context → small (2,000), private, semi-selective institution

## ❖ Undergraduate Admissions

- ❖ bi-monthly meetings of Admission, Financial Aid and Enrollment Services
- ❖ Shared operational calendar for application, admission, and FA packaging timelines
- ❖ Enrollment Leadership Team (Admissions, Financial Aid, Enrollment Services, Communications)
- ❖ Data sharing across systems (Slate/Banner) soon to be SLATE/PowerFaid/WorkDay)



Rhodes College



# Rhodes Example

## College Raptor

ID	[REDACTED]
EFC	\$26,973
IM EFC	\$38,594
Institutional Gift Aid	\$27,870
Non-Institutional Gift Aid	\$4,500
Need	\$39,687
Net Price	\$34,290
Work Study	\$2,000
Out Parent Loans	\$24,290
Out Student Loans	\$5,500
Parents Total Assets	\$0
Parents Total Income	\$130,000
Student Total Assets	\$2,500
Student Total Income	\$7,500
Timestamp	7/11/2021 18:17

# Other examples from the audience?

- ❖ What works at your institution?
- ❖ What doesn't work at your institution?
- ❖ What barriers to collaboration do you face?
- ❖ What are you worried about when it comes to collaboration?