

Financial aid processing

Automatically processes financial aid applications by verifying documents, calculating eligibility, and notifying students of their aid package status. Reduces processing time from weeks to days while ensuring compliance with federal regulations.

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Get Your Blueprint

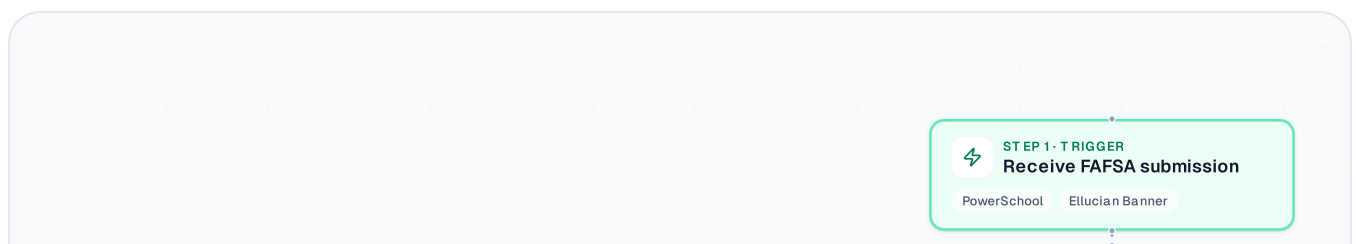
WORKFLOW TRIGGER

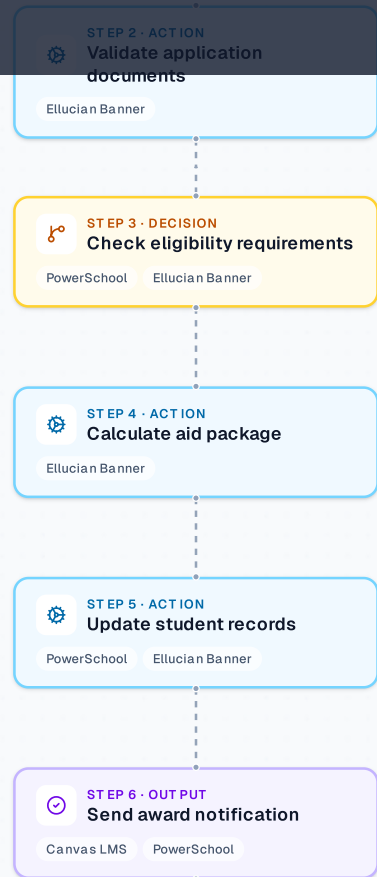


Student submits FAFSA application and supporting documents through the student portal

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive FAFSA submission

Student submits completed FAFSA application with required documents through the institutional portal. System captures all application data and attached verification documents.

2

 ACTION

Validate application documents

Automatically verify required documents are present and check data against federal databases for accuracy. Flag any missing or inconsistent information for manual review.

Ellucian Banner

3

 DECISION

Check eligibility requirements

Evaluate student's academic standing, enrollment status, and financial need against institutional and federal aid criteria. Route complete applications to calculation engine or incomplete ones to follow-up queue.

PowerSchool

Ellucian Banner

4

 ACTION

Calculate aid package

Automatically compute financial aid amounts including grants, loans, and work-study based on EFC, cost of attendance, and available funding. Generate preliminary award letter.

Ellucian Banner

5

 ACTION

Update student records

Record calculated aid amounts in student information system and update enrollment status. Prepare notification communications for both approved and pending applications.

PowerSchool

Ellucian Banner

6

OUT PUT

Send award notification

Automatically email students their financial aid award letter or request for additional documentation. Update student portal with current application status and next steps.

Canvas LMS

PowerSchool



Outputs

- Financial aid award letters
- Updated student enrollment records
- Compliance reporting data



Key Metrics

- Average processing time per application

- Percentage of applications processed without manual intervention

AI Business OS



Tools & Integrations

- PowerSchool
- Ellucian Banner
- Canvas LMS

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