

ENGAGE, SHARE, SUPPORT –

AN INTERACTIVE SESSION ON

FINANCIAL AID CUSTOMER

SERVICE

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WHAT THIS SESSION IS (AND ISN'T)

This Session IS	This Session IS NOT
Practical customer service strategies	A deep dive into regulations
Serving diverse student populations	Policy interpretation training
Interactive discussion and idea sharing	A lecture
Real-world solutions and resources	Compliance-focused instruction
Take-home improvements for your office	A review of handbook language

TODAY'S FOCUS

Part 1:

**Serving all
students with
excellence**

Part 2:

**Serving
Student
Veterans with
excellence**

PART I – ALL STUDENTS

WHY CUSTOMER SERVICE MATTERS



Every Interaction Counts

Each conversation can build confidence—or create barriers.



Trust Builds Loyalty

Positive experiences strengthen institutional trust and student satisfaction.



Student Success Connection

Helping students navigate aid successfully supports persistence and completion.



Beyond Processing

Financial aid professionals serve as educators, advocates, and solution-finders and dream-makers.

MOVING BEYOND COMPLIANCE

✅ **Compliance Is Essential**

Required for institutional integrity and student protection but...

❤️ **Service Creates Connection**

Empathy and support build trust during stressful moments

💬 **Communication Matters**

Responsive, clear, and respectful interactions improve the student experience

🔄 **Transform Routine Processes**

Turn forms, deadlines, and verification into opportunities to help students succeed

🤝 **Balance Knowledge with Support**

Combine policy expertise with a human-centered approach

EVERY INTERACTION TELLS A STORY

What story are students telling after they leave your office?

- ✓ "They helped me find a solution."
- ✓ "They listened and cared."
- ✓ "They made a complicated process easier."
- ✗ "I had to explain my situation over and over."
- ✗ "Nobody responded to my emails."
- ✗ "I felt like just another number."

**The story
students tell
becomes your
office's
reputation.**





SHARE →



REFLECT →



IMPROVE



Think of a memorable customer service experience

What made it positive—or negative?

What lessons can be applied to financial aid?



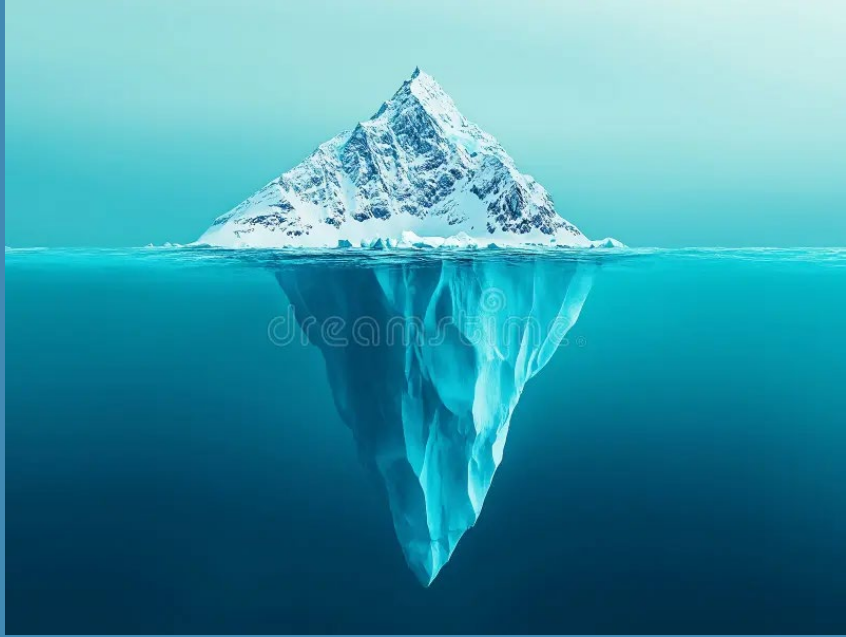
Who are your customers and stakeholders?

- Students
- Parents and families
- Veterans
- Faculty and staff
- Partners from other departments



Opportunity for Improvement

Identify one way your office could strengthen stakeholder engagement or communication.



**Customers Don't
Judge Effort**

**They Judge
Experience**

*What students remember
isn't how hard we worked
behind the scenes—it's
how we made their
experience feel.*

WHEN SERVICE CHALLENGES ARISE



Service Recovery Builds Trust

How we respond when something goes wrong often matters more than the mistake itself.



Problems Create Opportunities

Customers frequently become more loyal when an issue is resolved exceptionally well.



Sometimes Improvement Means Removing Obstacles

The best service enhancement isn't always adding something new—it's eliminating unnecessary hassles.



Design with the Student in Mind

Question forms, processes, and workflows. Are they necessary, or are they simply "how we've always done it"?



SHARE



REFLECT



IMPROVE

**"We've Always
Done It This
Way"**

**Is Not a Customer Service
Strategy**

**Every Form,
Process, and
Requirement**

Should Have a Purpose



What is one form, process, or requirement in your office that exists primarily because "we've always done it that way"?

Communication best practices



- Use CLEAR, student-friendly language
- Be an interpreter – FA has its own language
- Explain policies and changes in plain terms
- Meet students where they are through multiple communication channels



- Practice active listening and empathy
- Listen to HEAR not to RESPOND
- Focus on understanding before responding
- Don't talk about yourself
- Support students during stressful situations



- Provide timely and accurate follow-up
- Prioritize communication during high-volume periods
- Develop systems that keep important tasks on track (i.e. calendars, tracking systems, etc.)

KNOW

YOUR



AUDIENCE

- Adapt communication styles for diverse student populations
- Consider individual needs, experiences, and preferred communication methods



- Improve accessibility and service
- Leverage technology/ automation and AI tools appropriately
- Maintain the human connection



SHARE →



REFLECT →



IMPROVE

**Which communication
practice has the greatest
impact on your
students?**

**Clear Communication
Reduces Anxiety.**

**Confusing
Communication Creates
It.**

BUILDING A SERVICE CULTURE

 **Communicate Consistently**

 **Collaborate Across
Campus**

 **Promote Accountability &
Professionalism**

 **Recognize Service
Excellence**

Main takeaway:

A service mindset strengthens
the entire institution.

STRONG SERVICE REQUIRES STRONG PARTNERSHIPS

- ✓ Shared goals
- ✓ Clear communication
- ✓ Proactive problem-solving
- ✓ Consistent support for students
- ✗ Martyr mentality
- ✗ Lack of common vision and goals
- ✗ Limited time and resources
- ✗ Grudges and mistrust
- ✗ Temptation to villainize others
- ✗ “That’s not my job” thinking



SHARE →



REFLECT →



IMPROVE

**Students Don't See
Departments.**

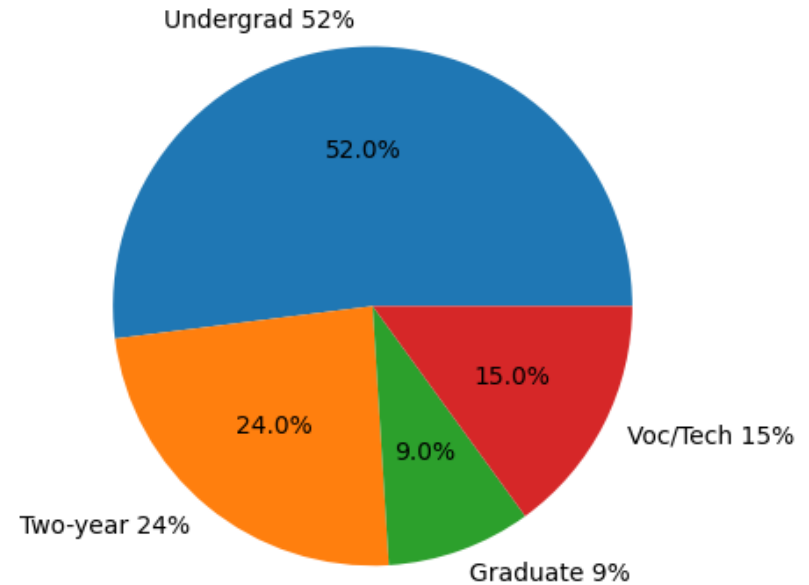
**They See One
Institution.**

What is one thing
your office does
that helps create a
positive service
culture?

PART 2 – VETERANS

CHARACTERISTICS OF STUDENT VETERANS

- Most are ages 24–40.
- 47% have children.
- 47.3% are married.
- 62% are first-generation college students.
- 75% of student Veterans are attending school full time.



UNIQUE STRENGTHS



- Veterans are different from traditional college students: older, more mature, more practical
- They have real world experience
- Veterans bring many strengths to campus including:
 - Organization
 - Leadership
 - Discipline
 - Follow through
 - Teamwork
 - Sense of duty
 - Problem solving
 - Resiliency

UNIQUE CHALLENGES



- Many think that typical college students are naïve, opinionated and have no life experience.
- Hard to re-adjust to real world when you perceive those around you as immature and disrespectful.
- Multiple roles, such as parent, spouse, employee, or Reservist/Guardsman.
- Some student Veterans are dealing with physical and emotional disabilities.
 - **Musculoskeletal problems**
 - **Hearing problems**
 - **Sleep disorders**
 - **"Invisible wounds"** of war such as traumatic brain injury, posttraumatic stress disorder, major depression, or anxiety.

15 THINGS VETERANS WANT YOU TO KNOW



Educating a Nation

- Our Mission: Educating a Nation
- PsychArmor® Institute provides critical resources to Americans so they can effectively engage with and better support military service members, Veterans and their families across our nation.

#1

WE ARE NOT
ALL SOLDIERS.

Question #1:

What branch??



#2

**NOT EVERYONE IS
INFANTRY**

Question #2
What was your job?





#3
IT IS
REALLY
HARD FOR
US TO ASK
FOR HELP.

Offer to help.

#4

Not every veteran
and service member
had the same
experiences.



#5

Not every veteran has
PTSD.



STRATEGIES FOR BUILDING TRUST & COLLABORATIONS



- ❖ **Let veterans know that you are on their side.**
- ❖ **Show your appreciation for their service by helping them access all benefits for which they are eligible**

ACTIONABLE STEPS



**Know the
benefits that
may be available**



**Encourage
responsible
borrowing if a
student needs
or chooses to
take out a
student loan**



**Help navigate
through
financial aid
world and
translate
“financial aid-
ese”**



**Refer student
veterans to
available
resources (on-
campus and off)**

HOW TO HELP

- **Know the current MHA for your area**
- **Make sure Vets realize MHA is paid in arrears**
- **Celebrate Veteran's Day**

MORE WAYS TO HELP



Keep veterans certified to prevent MHA disruptions.



Be a nag. Keep pestering.



Learn not to take things personally.



Use the SCO hotline and Ask a Question.

HELP THEM
HELP
THEMSELVES

- ❖ **Get PA veterans to meet the PHEAA deadlines!!!**
- ❖ **Calculate the payoff for paperwork effort**
- ❖ **When needed, use your authoritative voice**



SHARE



REFLECT



IMPROVE

*What is one action you can
take when you return to
campus that would improve
the veteran student
experience?*

QUESTIONS?

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RESOURCES

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NASFAA - Customer Service Competency

https://www.nasfaa.org/customer_service

Trellis Strategies - The Importance of Campus Customer Service to Enrollment and Retention

https://www.trellisstrategies.org/wp-content/uploads/2024/04/Toolkit_CustomerService.pdf

Element 451 - 7 Strategies to Improve Customer Service in Higher Education

<https://element451.com/blog/customer-service-in-higher-ed>

the institute for college access & success – Top Ten Student-Centered Approaches to FA Services

https://ticas.org/wp-content/uploads/legacy-files/program_page/Top_Ten_List_Services_0.pdf

RESOURCES

- **Electronic Announcements about Veterans Education Benefits and FA:**
 - <https://ifap.ed.gov/eannouncements/081309GuidFedVeteransEdBenefits.html>
 - <https://ifap.ed.gov/eannouncements/070209FederalVeteransEducationBenefits.html>
- **Ask a Question:** <https://www.va.gov/contact-us/ask-via/introduction>
- **SCO Handbook:**
https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/55440000001018/content/554400000149088/School-Certifying-Official-Handbook-On-line
- **SCO Hotline:** (855) 225-1159

RESOURCES

- **PyschArmor:** <https://psycharmor.org>
- **Direct Deposit for education benefits:** (888)442-4551
- **Vet Centers:** <https://www.vetcenter.va.gov>
- **Veterans Crisis Line:** (800) 273-8255

RESOURCES

BAHCalculator:

<https://www.travel.dod.mil/Allowances/Basic-Allowance-for-Housing/BAH-Rate-Lookup/>

VA College Toolkit:

<https://www.mentalhealth.va.gov/student-veteran/>