TO BOLDLY GO…NEXT GEN!

ILLINOIS CENTRAL COLLEGE – GT EFORMS ™

NO SPECIAL CONSIDERATION, BUT A “THANK YOU” TO PARAMOUNT, ETC. FOR THE BORROWED GRAPHICS

TITLE IV VERIFICATION…THE FINAL FRONTIER!

- This is a Case Study of the ICC Enterprise Systems team.
  Its four-month mission:
  To digitize all verification forms,
  To automatically update Checklist Item Statuses and move attachments to ImageNow.
  …To Boldly Go Where No Verification eForm Has Gone Before!

HOW WE GOT HERE…

- Beginning – paper (that should sum it up)
- COVID…do you see a problem with paper?
- LeapFile – more like

- OPTIONS:
  - Vanilla
  - GT
  - Something else
-

TIMELINE!

- November 30, 2020
- Initial training (me)
- Start planning in Excel

- January 2021
- Rest of Enterprise trained
- Start work on eForms

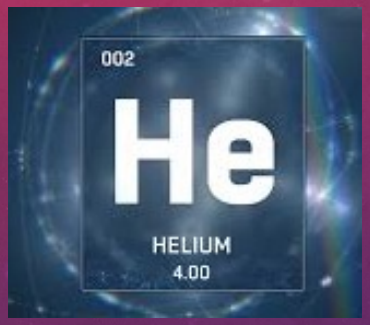
- April 1, 2021
- GO LIVE with 86 eForms for 2 AY's!

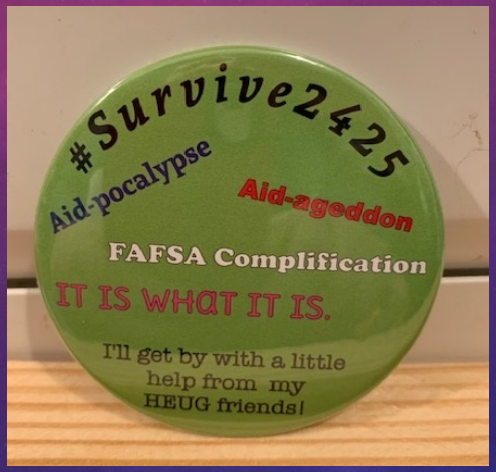
CURRENT COUNT

- FA – 5 Aid Years (168 eForms)
  - Why so many?
  - Rebuild each Aid Year (about a week – other things happen)
    - No cloning yet
    - Wording change every year (Tax Transcript for 2022, etc.)

- SF – 1 eForm
- Veterans – 1 eForm (major upgrade underway)
- Records – several planned or paused

A TINY RIFT IN THE UNIVERSE…



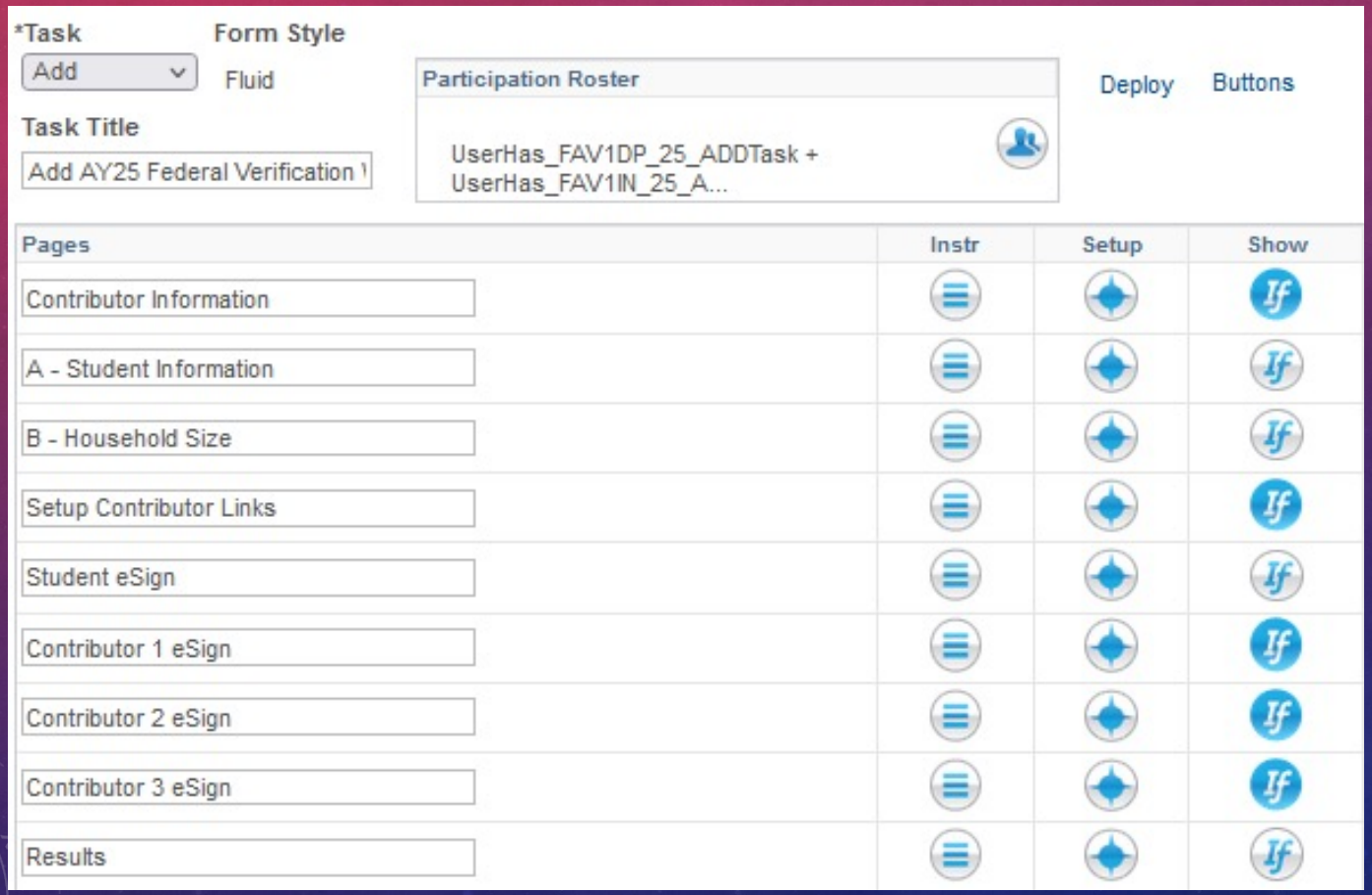


AY2025 - VERIFICATION REINVENTED!

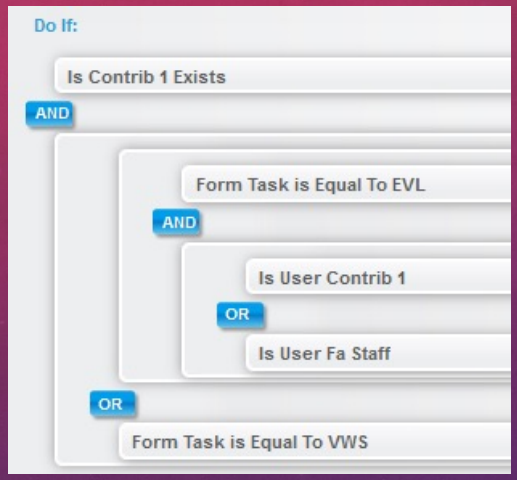
- Streamlined
- "Make it so"

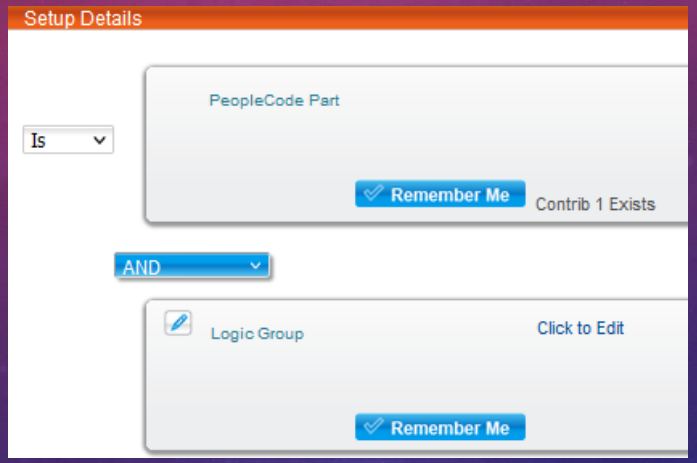
- On-page Validations
- Cool pre-population

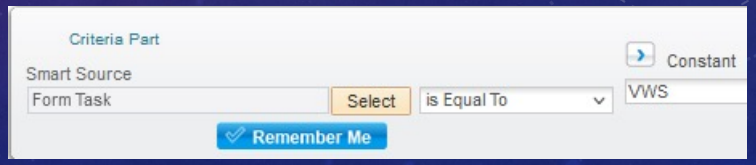
HOW MANY IN SINGLE EFORM? (6…NOW 4)



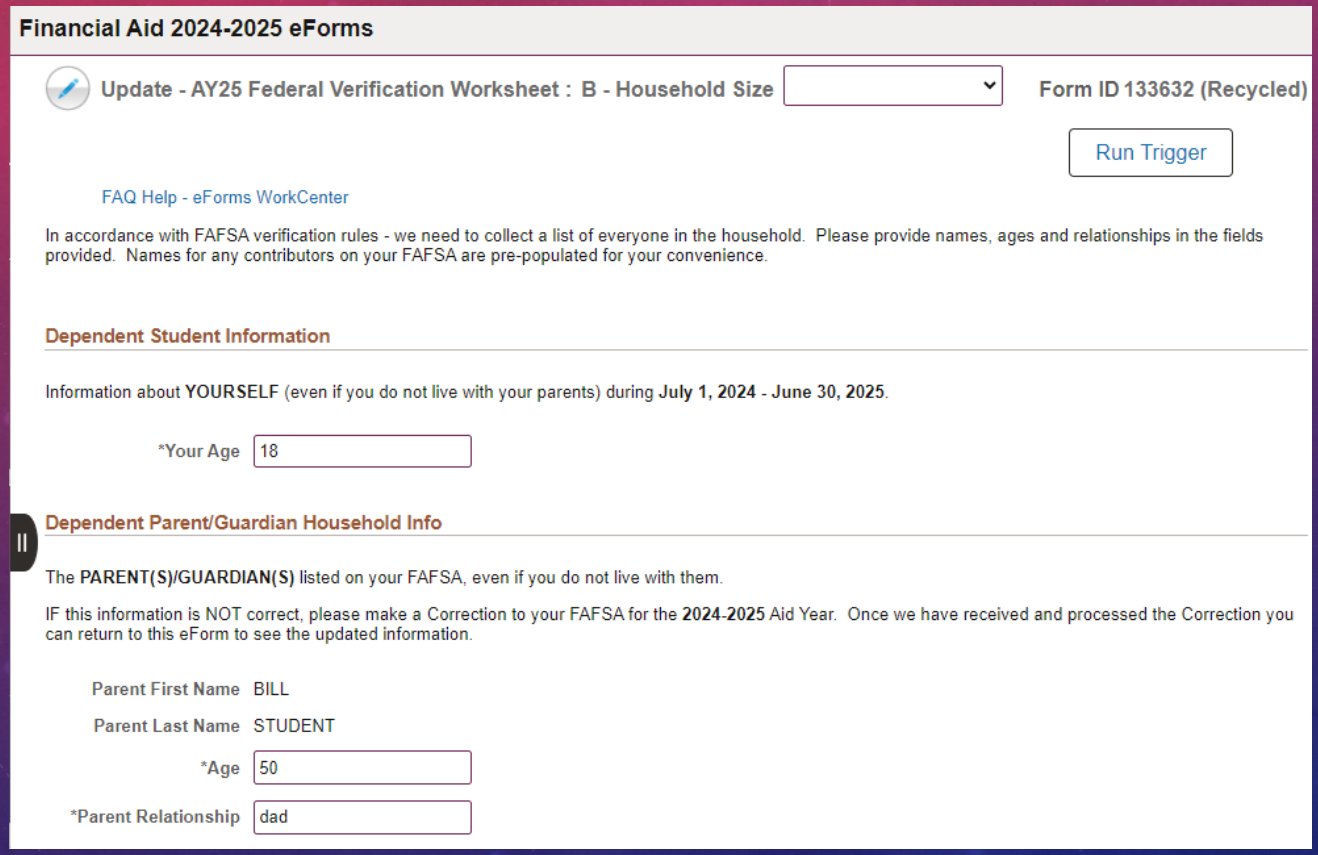
IF…THEN…ELSE…IT'S ALL PERFECTLY LOGICAL, CAPTAIN







BUT WHAT DO THEY SEE?



Financial Aid 2024-2025 eForms

Update - AY25 Federal Verification Worksheet : B - Household Size

Form ID 133632 (Recycled)

Run Trigger

FAQ Help - eForms WorkCenter

In accordance with FAFSA verification rules - we need to collect a list of everyone in the household. Please provide names, ages and relationships in the fields provided. Names for any contributors on your FAFSA are pre-populated for your convenience.

Dependent Student Information

Information about **YOURSELF** (even if you do not live with your parents) during **July 1, 2024 - June 30, 2025**.

*Your Age 18

Dependent Parent/Guardian Household Info

The **PARENT(S)/GUARDIAN(S)** listed on your FAFSA, even if you do not live with them.

IF this information is NOT correct, please make a Correction to your FAFSA for the **2024-2025** Aid Year. Once we have received and processed the Correction you can return to this eForm to see the updated information.

Parent First Name BILL

Parent Last Name STUDENT

*Age 50

*Parent Relationship dad

YES/NO TO SHOW MORE/LESS

Other People In Household

Are there OTHER PEOPLE who now *live with your parents* and your parents *provide more than half* of the other person's support, **AND** will continue to provide *more than half* of that person's support from **July 1, 2024** thru **June 30, 2025?**

*Others in Household? No

Houshold Size

Enter the total number of people in the household others in the household.

*Total in Household 2

Comments

Other People In Household

Are there OTHER PEOPLE who now *live with your parents* and your parents *provide more than half* of the other person's support, **AND** will continue to provide *more than half* of that person's support from **July 1, 2024** thru **June 30, 2025?**

*Others in Household? Yes

Other People In Household - details

Please enter below the names, ages, and relationship to yourself from any other people in the household. Include anyone who current lives in the household if A) you (as an Independent) or B) your parents (as a Dependent) will continue to provide more than half of the support for those listed from **July 1, 2023 thru June 30, 2024**.

1 row

	*Other(s) Name(s)	*Age	*Relationship to Student		
1		0		+	−

ON-PAGE ERRORS…WISHES GRANTED!

Financial Aid 2024-2025 eForms

Validation Messages

It appears your Household size is incorrect based on your answers, please review.*

**Error will be rechecked on page navigation*

	*Other(s) Name(s)	*Age	*Relationship to Student		
1	Rerun	3	brother	+	−

Houshold Size

Enter the total number of people in the household. This shoul any parent/parent spouse (if you are a Dependent), and others in the household.

*Total in Household 2

Please correct errors before continuing

OK

CONFIGURE S!

General
Pages
Validations
Form Type FA001B25
Verification W
Conditions
Condition Default
Form Validations
Validation 1
Severity Erro
Show Validation
*Message Text
Free-Form
Free-Form Text
It appears y
On the Add Task When
Leaving These Fields
On the Update Task Whe
Leaving These Fields
On the Evaluate Task Wh
Leaving These Fields
GT Logic Engine
Visual If Expression :
BACK
Do If:
Total in Household is Not Equal To 2
AND
Parent Spouse First Name is Empty
AND
Others in Household? is Equal To N
OR
Total in Household is Not Equal To 3
AND
Parent Spouse First Name is Not Empty
AND
Others in Household? is Equal To N
OR
Total in Household is Less Than 3
AND
Parent Spouse First Name is Empty
AND
Others in Household? is Equal To Y
OR
Total in Household is Less Than 4
AND
Parent Spouse First Name is Not Empty
AND
Others in Household? is Equal To Y
1 of 1
Last
1 of 1
Last
ages

PICK YOUR POISON, CAPTAIN? WHY WOULD YOU DRINK POISON?

Validation 1 Severity Error

Show Validation

*Message Text Free-Form

Free-Form Text It appears your Household size is incorrect based on your answers, please review.

On the Add Task When

Leaving These Fields *Total in Household* Leaving These Pages *Page 3: B - Household Size*

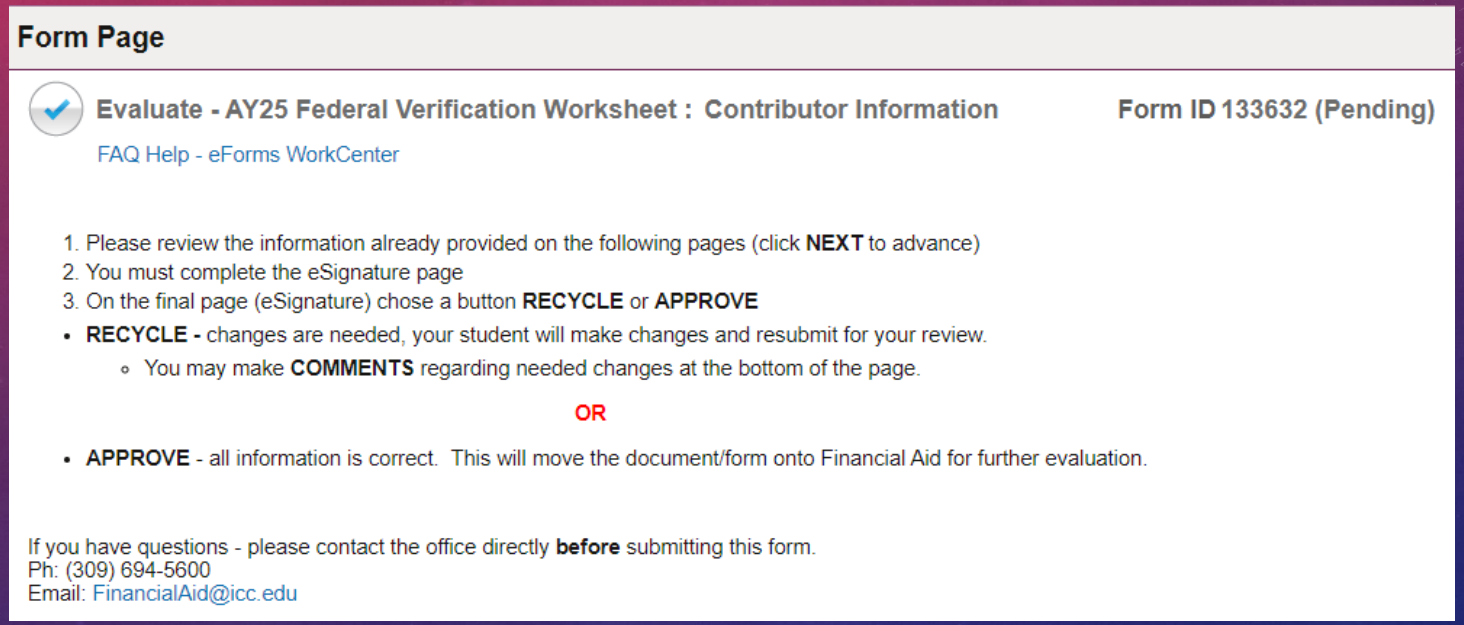
On the Update Task When

Leaving These Fields *Total in Household* Leaving These Pages *Page 3: B - Household Size*

On the Evaluate Task When

Leaving These Fields *Total in Household* Leaving These Pages *Page 3: B - Household Size*

ONLY SHOW TO WHO NEEDS IT, WHEN THEY NEED IT



Form Page

Evaluate - AY25 Federal Verification Worksheet : Contributor Information **Form ID 133632 (Pending)**

FAQ Help - eForms WorkCenter

1. Please review the information already provided on the following pages (click **NEXT** to advance)
2. You must complete the eSignature page
3. On the final page (eSignature) chose a button **RECYCLE** or **APPROVE**

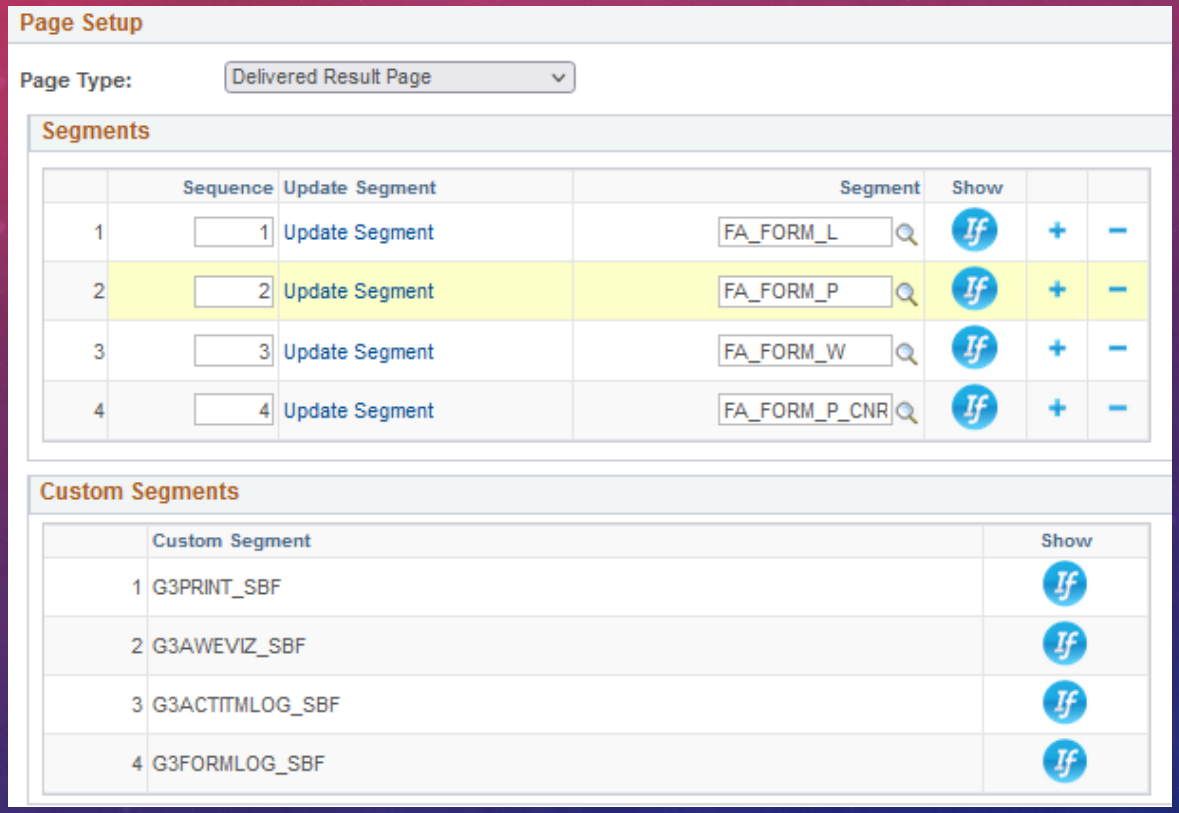
- **RECYCLE -** changes are needed, your student will make changes and resubmit for your review.
  - You may make **COMMENTS** regarding needed changes at the bottom of the page.

OR

- **APPROVE** - all information is correct. This will move the document/form onto Financial Aid for further evaluation.

If you have questions - please contact the office directly **before** submitting this form.
Ph: (309) 694-5600
Email: FinancialAid@icc.edu

NOYB – SETUP (CLOAKING DEVISE)



Page Setup

Page Type: Delivered Result Page

Segments

	Sequence	Update Segment	Segment	Show
1	1	Update Segment	FA_FORM_L	
2	2	Update Segment	FA_FORM_P	
3	3	Update Segment	FA_FORM_W	
4	4	Update Segment	FA_FORM_P_CNR	

Custom Segments

	Custom Segment	Show
1	G3PRINT_SBF	
2	G3AWEVIZ_SBF	
3	G3ACTITMLOG_SBF	
4	G3FORMLOG_SBF	

NOYB – WHAT THEY SEE

Financial Aid 2024-2025 eForms

Update - AY25 Federal Verification Worksheet : Results

Form ID 133632 (Pending)

Run Trigger

FAQ Help - eForms WorkCenter

Document/Form Status - PENDING (submitted)

Thank you for submitting your document/form, Checklist Item Status is now ***Notified*** **-** pending your Contributor(s) signature(s).

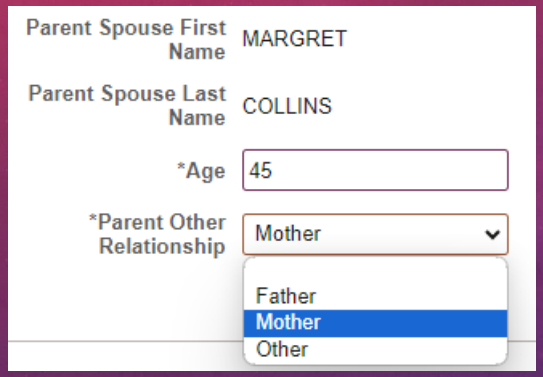
Once your Contributor(s) finish their signature(s) your eForm will be automatically forwarded for a Staff member to review your document/form.

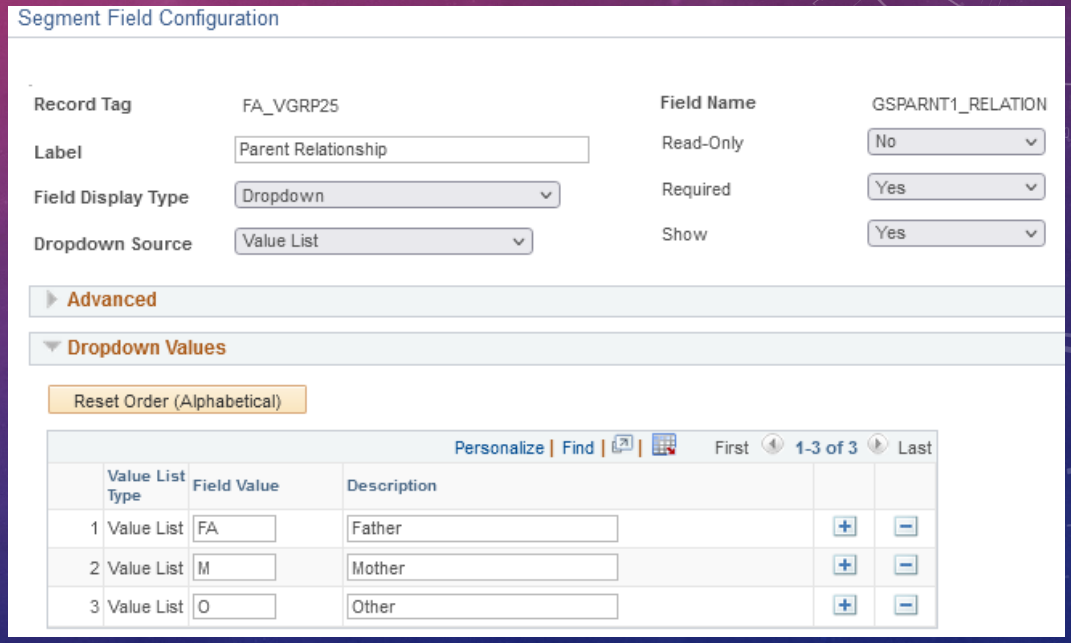
NEXT STEPS:

- Upon successful review, the Checklist Item Status will be ***Completed*** and will no longer appear on your To Do list
- If the document/form is not acceptable as submitted, the Checklist Item Status will update to ***Returned***. The original form will be available under the Checklist Item. Please see the Comments regarding the issue, make corrections, click Submit.

ALL Checklist Items must be completed for your financial aid to be processed.

DROP BY ONCE IN A WHILE…





CONFIGURE E-SIGN BY PAGE FOR DISCLOSURES

Form Page

Evaluate - AY25 Federal Verification Worksheet : Contributor 1 eSign — Form ID 133632 (Pending)

FAQ Help - eForms WorkCenter

Contributor eSign

Type your name in the box below to complete your electronic signature.

By signing this form:

1. I am giving permission for my typed name to represent my signature
2. I am certifying the information contained is complete/correct

FEDERAL WARNING: If you purposely give false or misleading information; you may be fined, be sentenced to jail, or both.

COMMENTS - Use to add further information or clarify an answer/situation.

QUESTIONS - please contact the office directly **before** submitting this form

Ph: (309) 694-5600
Email: FinancialAid@icc.edu

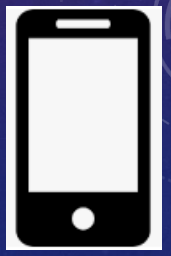
It is the policy of this College that no person, on the basis of race, color, religion, gender, national origin, age, disability, sexual orientation, or veteran's status, shall be discriminated against in employment, in educational programs and activities, or in admission. Inquiries and complaints may be addressed to the Compliance Officer, Diversity Department.

Action Items

1 row

	Acknowledgement	
1		See above disclosure regarding electronic signature information.

Comments



HTML COMMENTS!!!

We are not able to accept your document/form, ***Verification Worksheet AY25***, as submitted.

To Correct Document/Form:

- Go to **ICC eForms WorkCenter**
- Select ***Update Aid Year 2023-2024 Form***
- Search for **Form Type** (listed above) or, enter **Form ID - 133661**
- Review Comments for details from Staff (expand triangle at bottom of page on form)
- Make necessary changes
- Click Resubmit

Comment History:

_____
** GT Public Portal Guest
** Wed, Mar 27 24, 12:20:46 PM
testing Recycle when C1 signed

Thank you,

Financial Assistance Office

Comment History:

%3

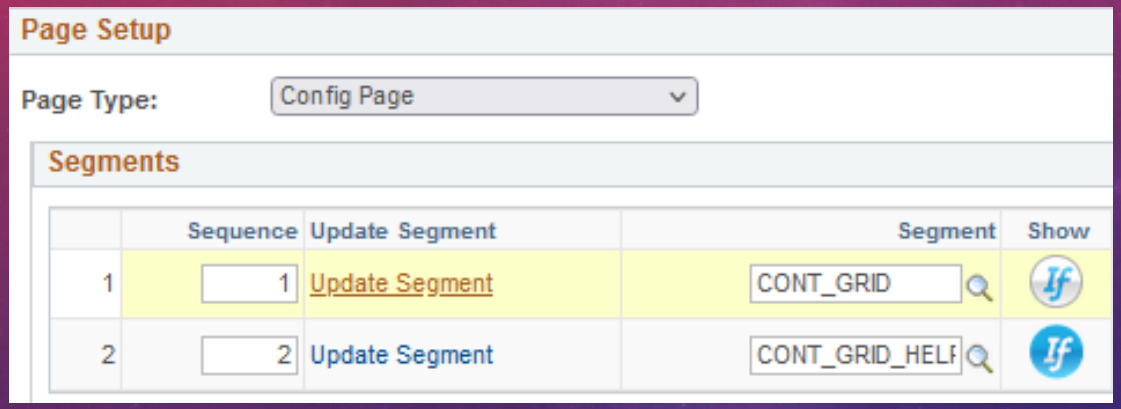
Thank you,

HTML Store Messages

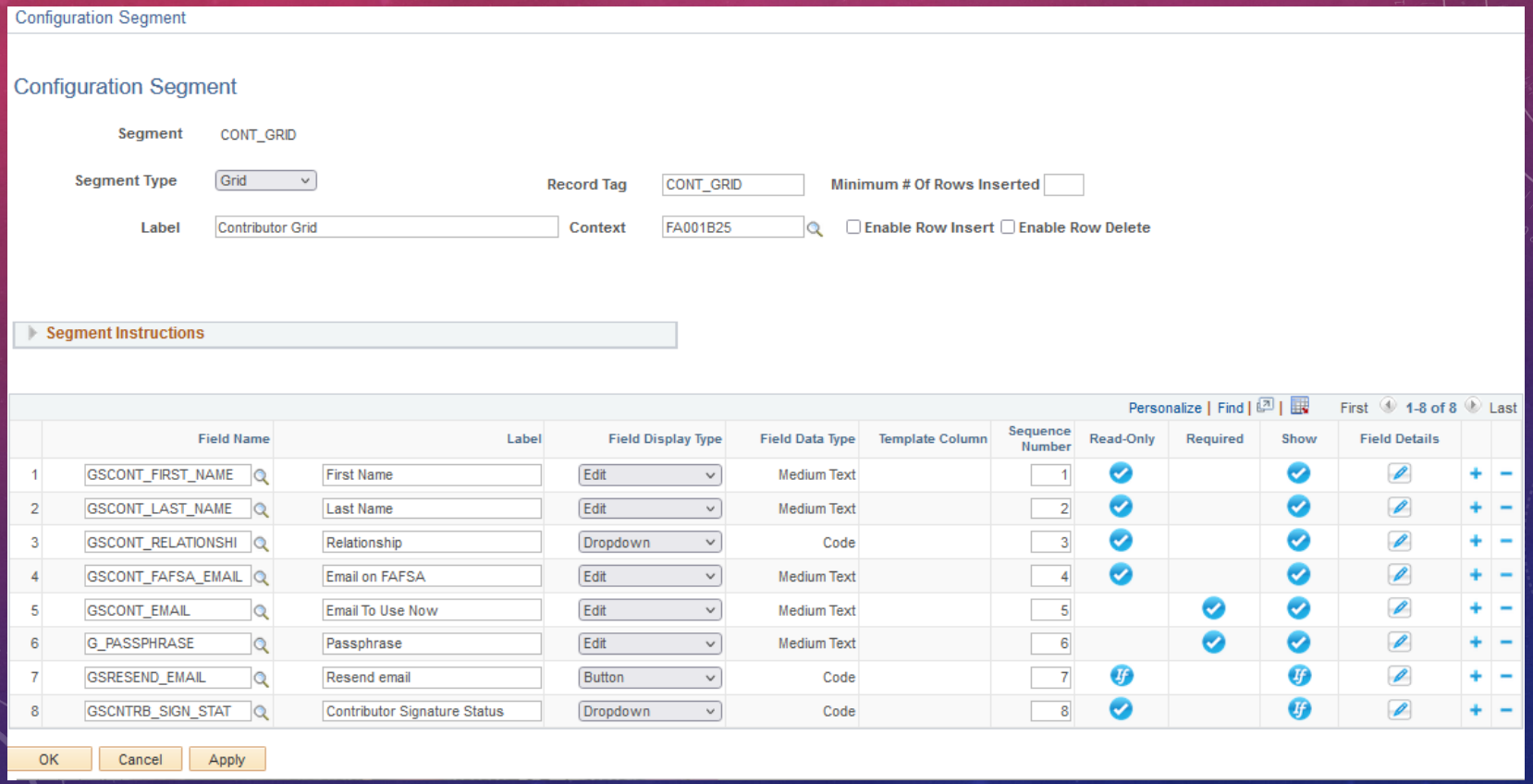
Dynamic SmartSource Tags

*Value	Smart Source
%1	[FA_25STD_INFO:FIRST_NAME]
%2	Form Type Descr
%3	Comment History Html
%4	Form Id

FEEDING THE ~~TRIBBLES~~ CONTRIBUTOR(S)



PRE-POPULATING FROM ISIR



ENERGIZE

Contributor Grid

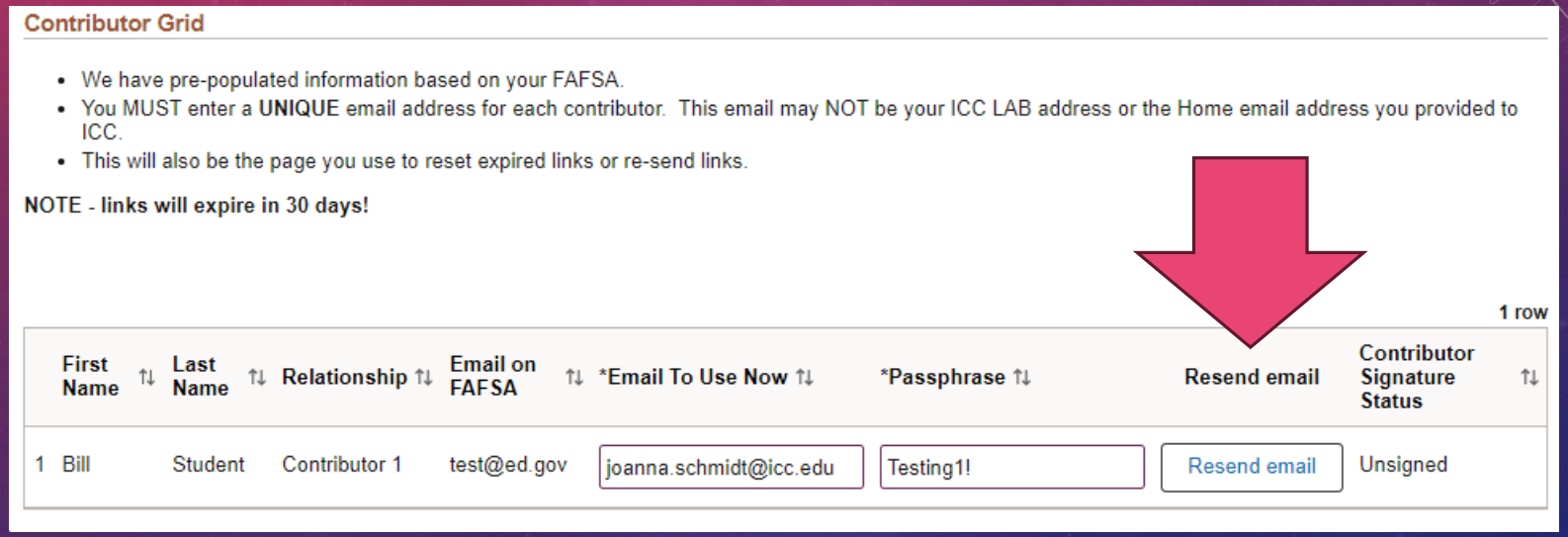
- We have pre-populated information based on your FAFSA.
- You MUST enter a **UNIQUE** email address for each contributor. This email may NOT be your ICC LAB address or the Home email address you provided to ICC.
- This will also be the page you use to reset expired links or re-send links.

NOTE - links will expire in 30 days!

1 row

	First Name	Last Name	Relationship	Email on FAFSA	*Email To Use Now	*Passphrase	Contributor Signature Status
1	Bill	Student	Contributor 1	test@ed.gov	joanna.schmidt@icc.edu	Testing1!	Unsigned

EMPOWER THE STUDENT TO RESET TOKEN



Contributor Grid

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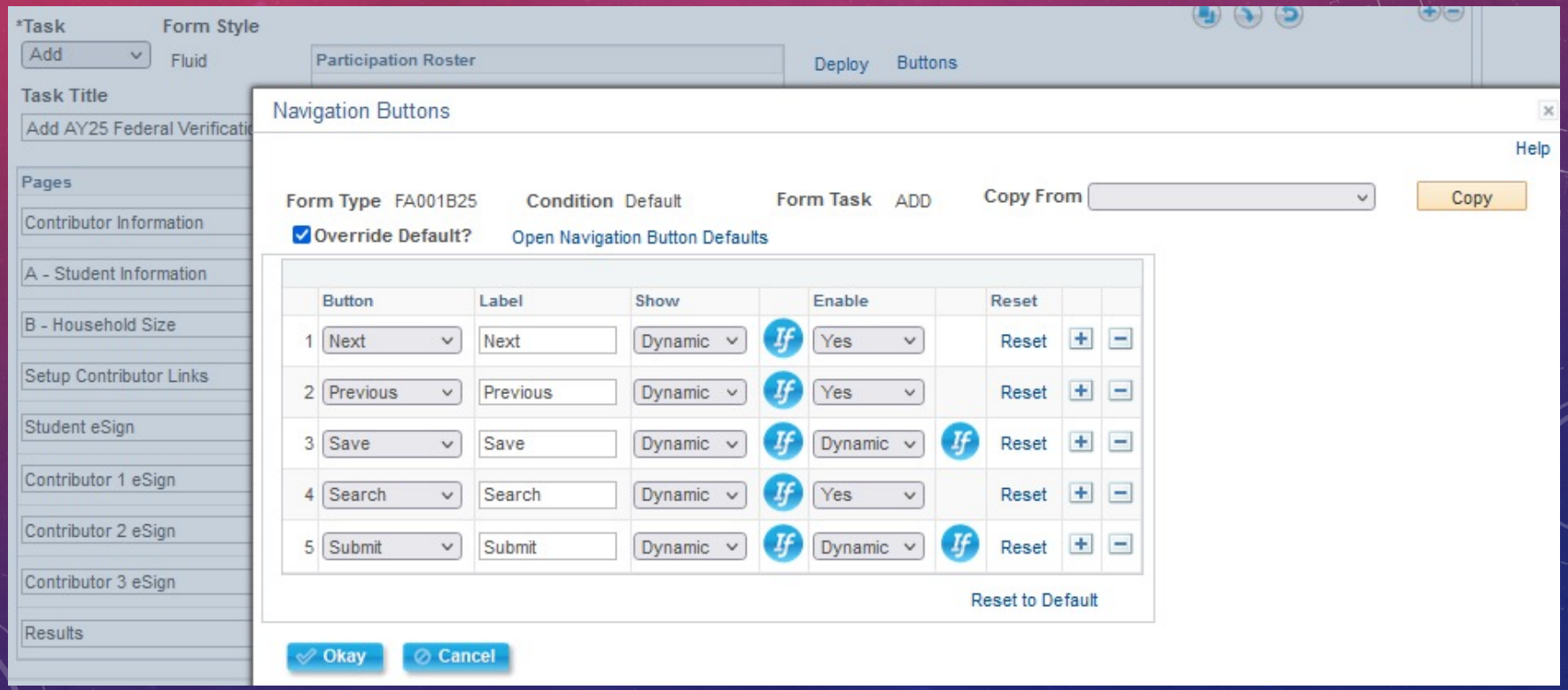
1 row

	First Name	Last Name	Relationship	Email on FAFSA	*Email To Use Now	*Passphrase	Resend email	Contributor Signature Status
1	Bill	Student	Contributor 1	test@ed.gov	joanna.schmidt@icc.edu	Testing1!	Resend email	Unsigned

WHAT THEY DON'T SEE – WILL SAVE YOU ON CLEANUP



WHO SIGNED AS WHO?

Form Page

Evaluate - AY25 Federal Verification Worksheet : Student eSign **Form ID 133632 (Pending)**

FAQ Help - eForms WorkCenter

Student Signature

Type your name in the box below to complete your electronic signature.

By signing this form:

1. I am giving permission for my typed name to represent my signature
2. I am certifying the information contained is complete/correct

FEDERAL WARNING: If you purposely give false or misleading information; you may be fined, be sentenced to jail, or both.

COMMENTS - Use to add further information or clarify an answer/situation.

QUESTIONS - please contact the office directly **before** submitting this form

Ph: (309) 694-5600
Email: FinancialAid@icc.edu

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Signature	Message	Timestamp
lindsay1	See above disclosure regarding electronic signature information.	2024-03-26-09.23.22.000000
lindsay2	See above disclosure regarding electronic signature information.	2024-03-26-09.35.13.000000
student3	See above disclosure regarding electronic signature information.	2024-03-26-13.41.12.000000
student5	See above disclosure regarding electronic signature information.	2024-03-26-13.56.00.000000
student6	See above disclosure regarding electronic signature information.	2024-03-26-14.00.45.000000
student7	See above disclosure regarding electronic signature information.	2024-03-26-14.05.27.000000
student7	See above disclosure regarding electronic signature information.	2024-03-26-14.27.03.000000

CONTRIBUTOR NOTICE (BODY)

Dear Antonio,

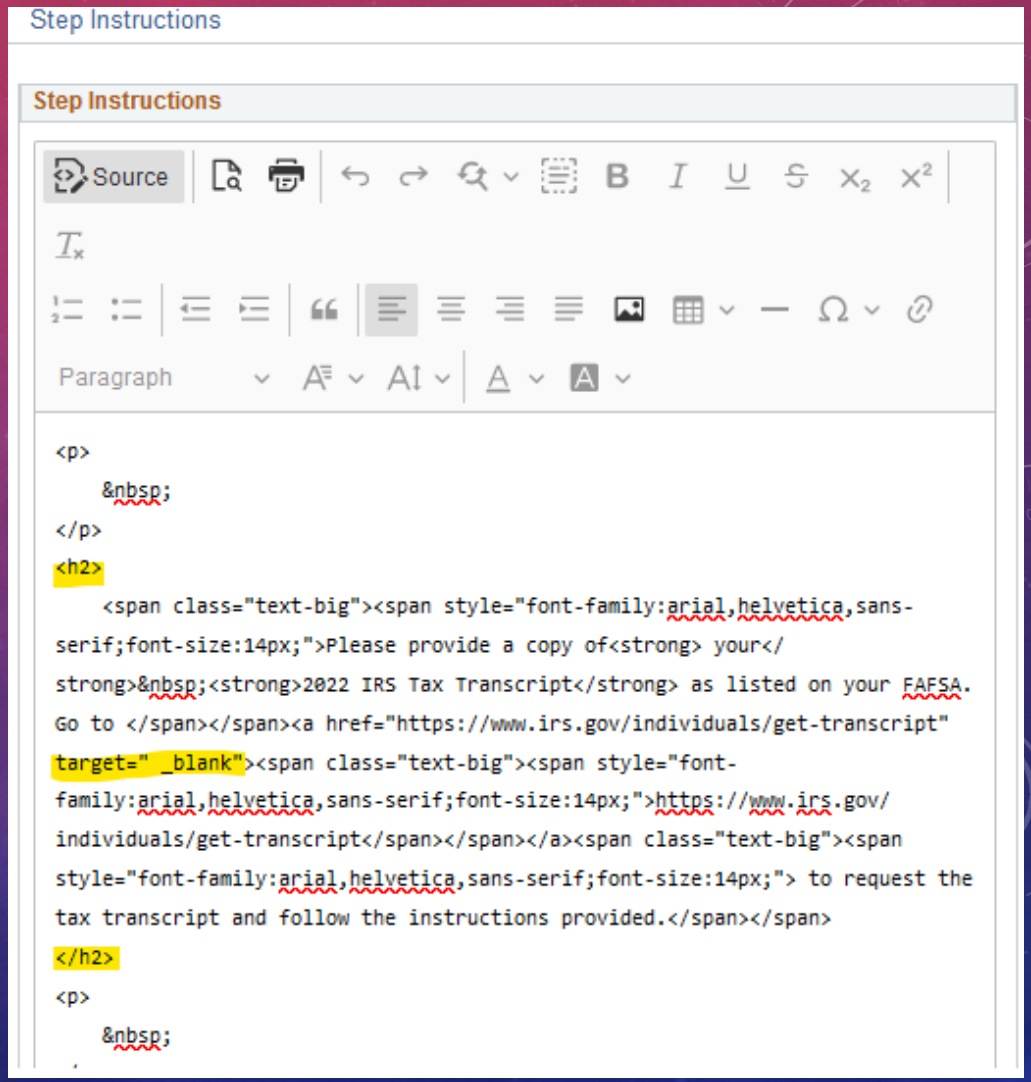
Your signature is required for Federal Verification on the FAFSA for (Irma). Please use this token to login and complete the required Parent Signature:

Click Here To Complete

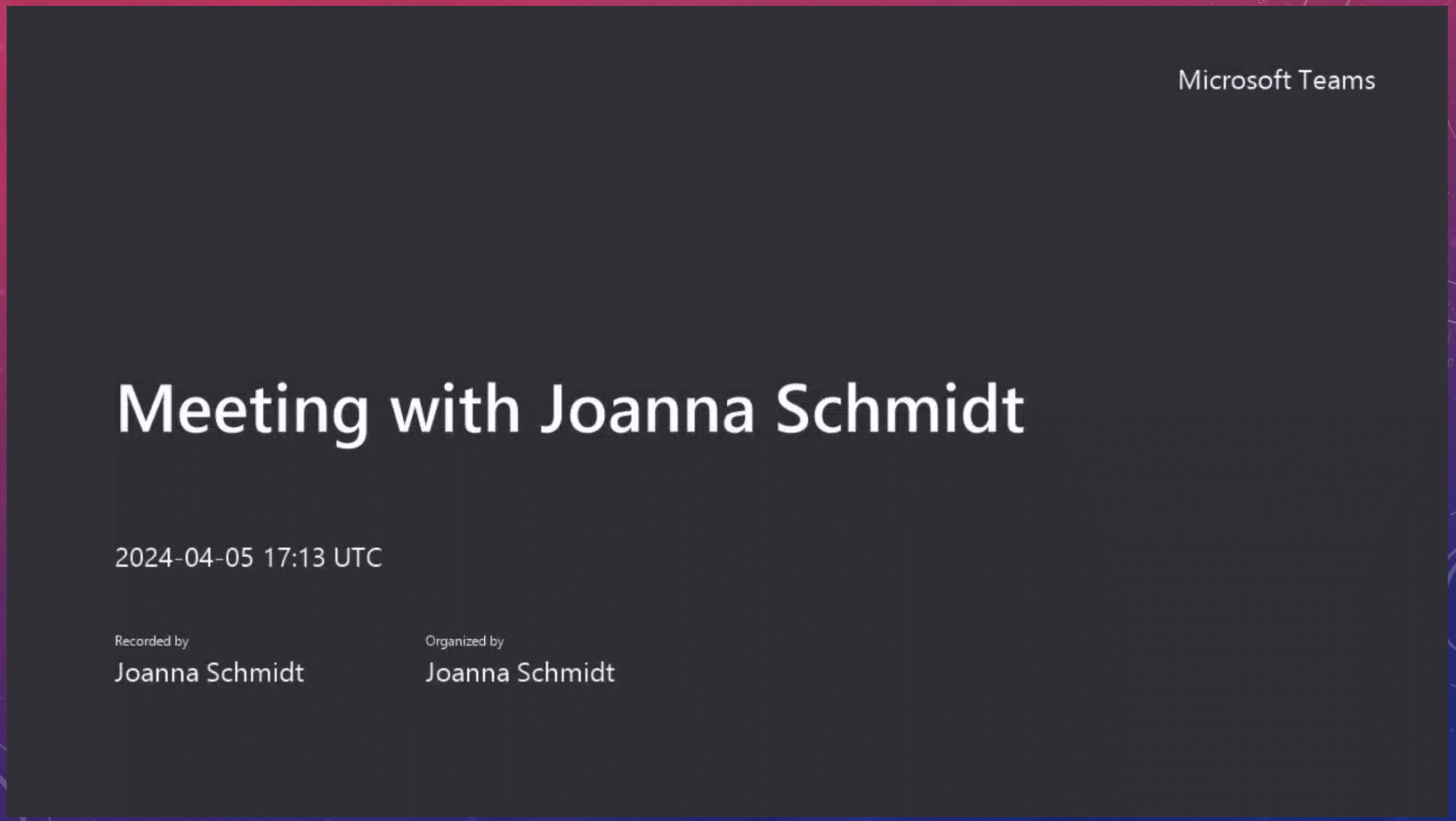
This link will **expire in 30 days**.

Thank you,
Financial Assistance Office

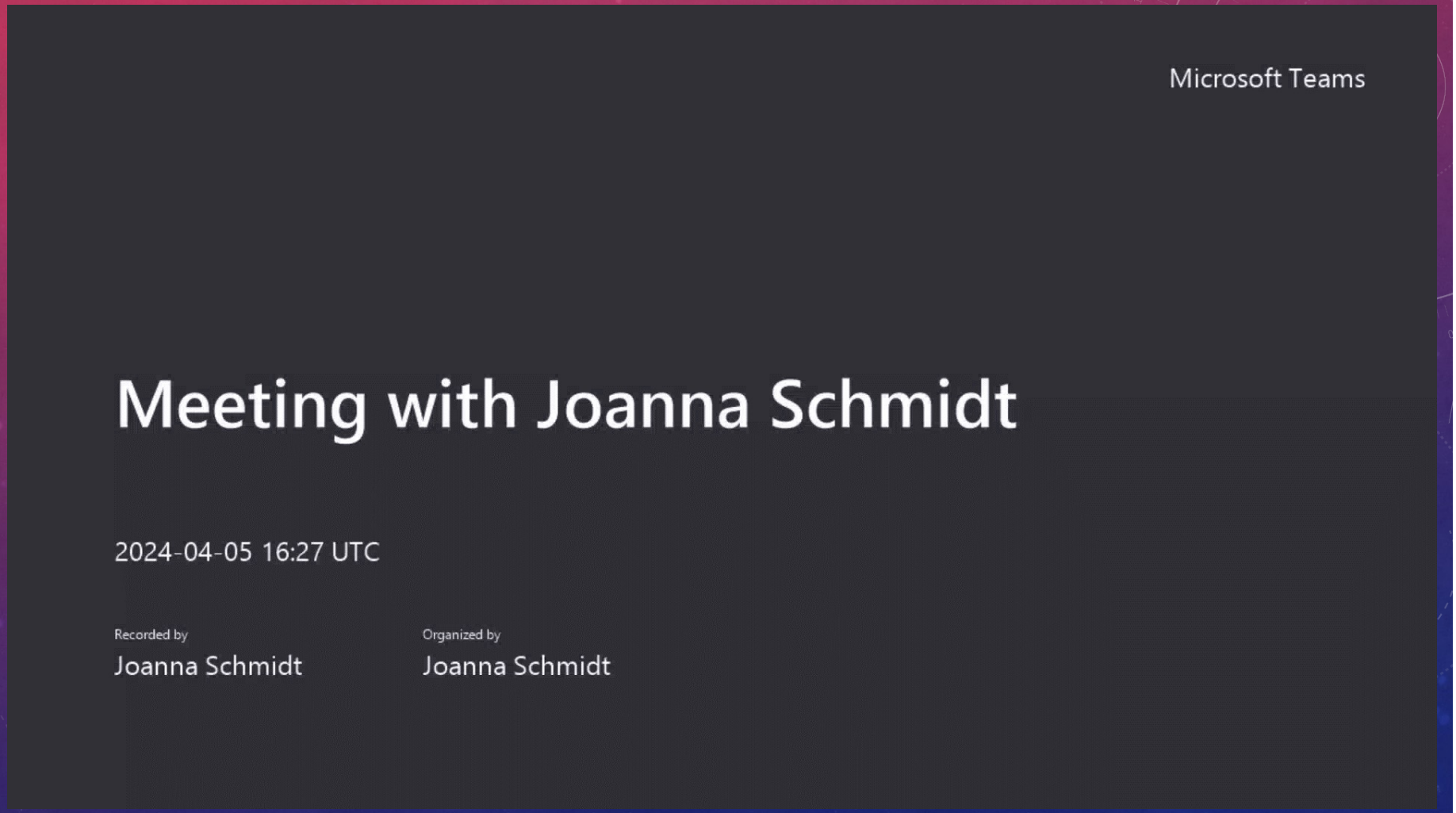
LINKS IN NEW WINDOWS



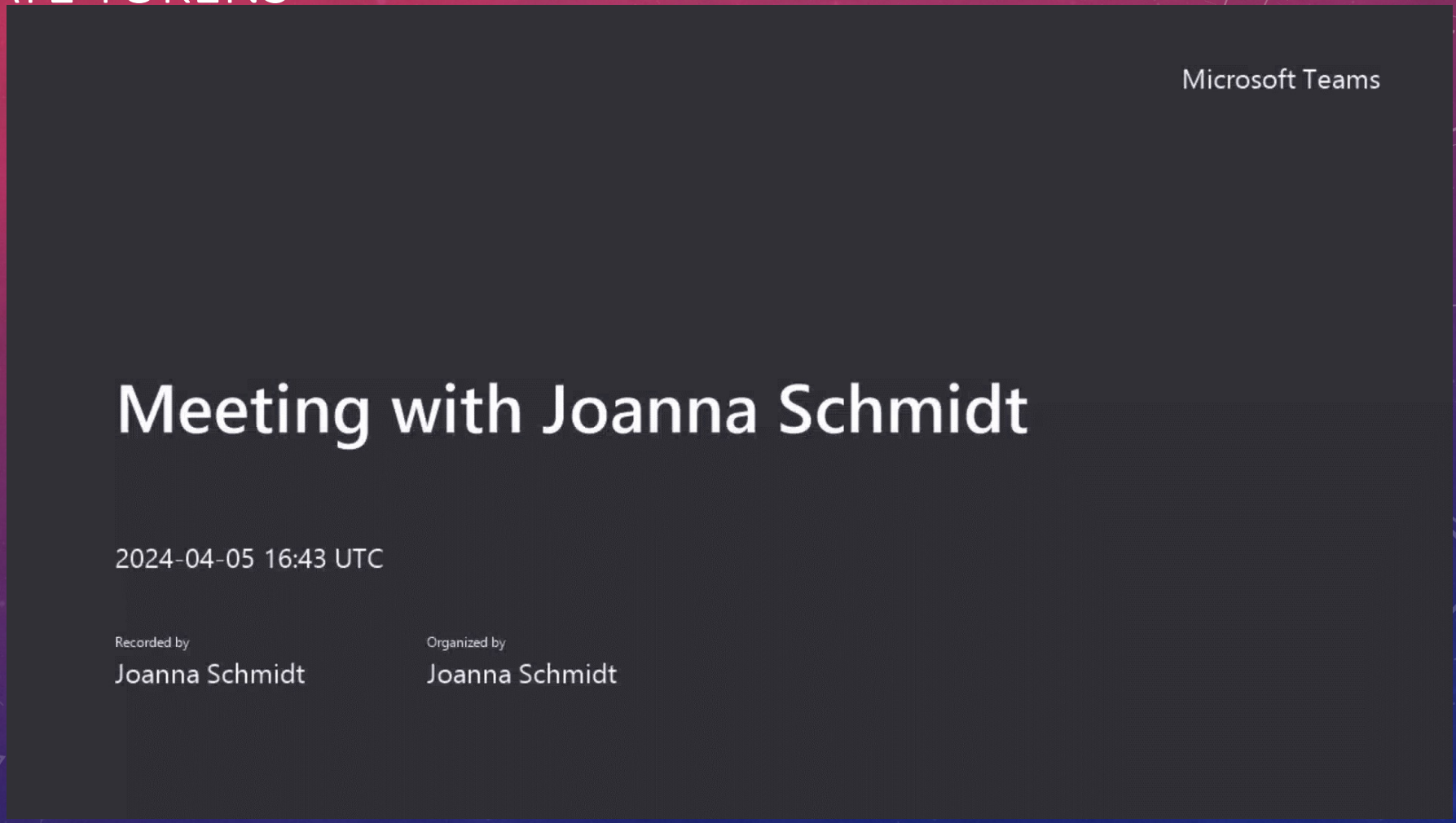
VERIFICATION EFORM



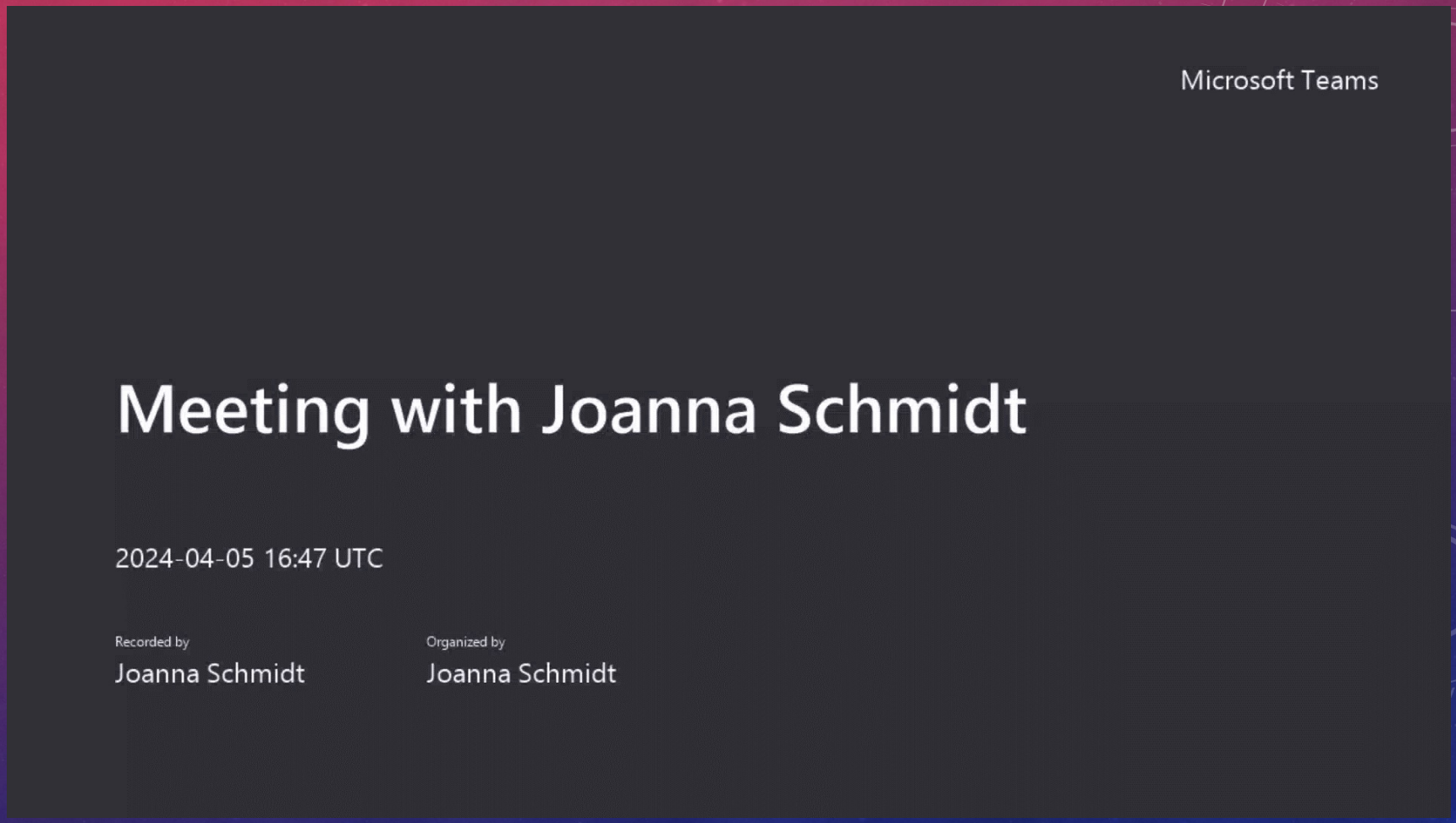
CONTRIBUTOR ESIGN



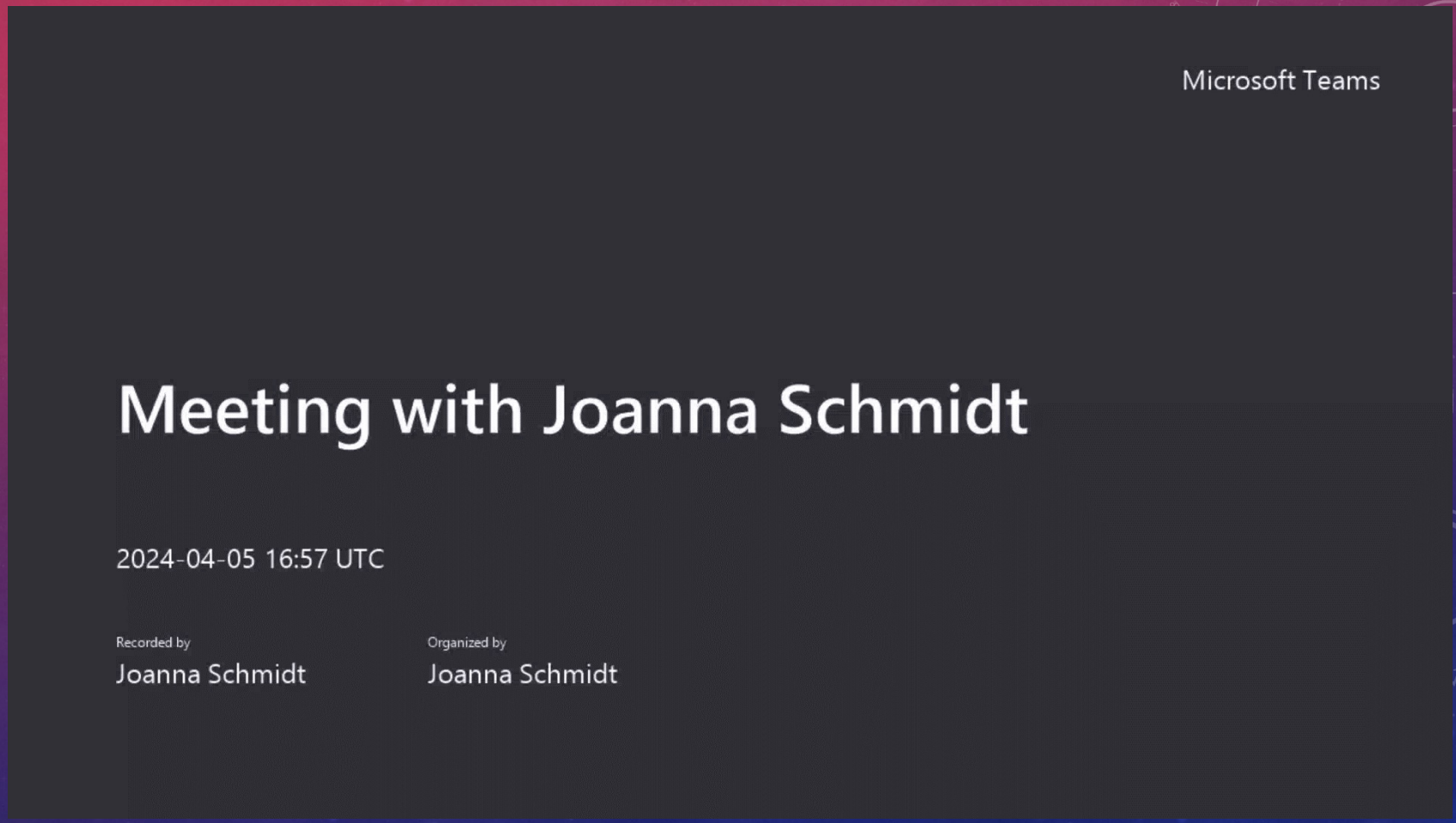
UPDATE TOKENS



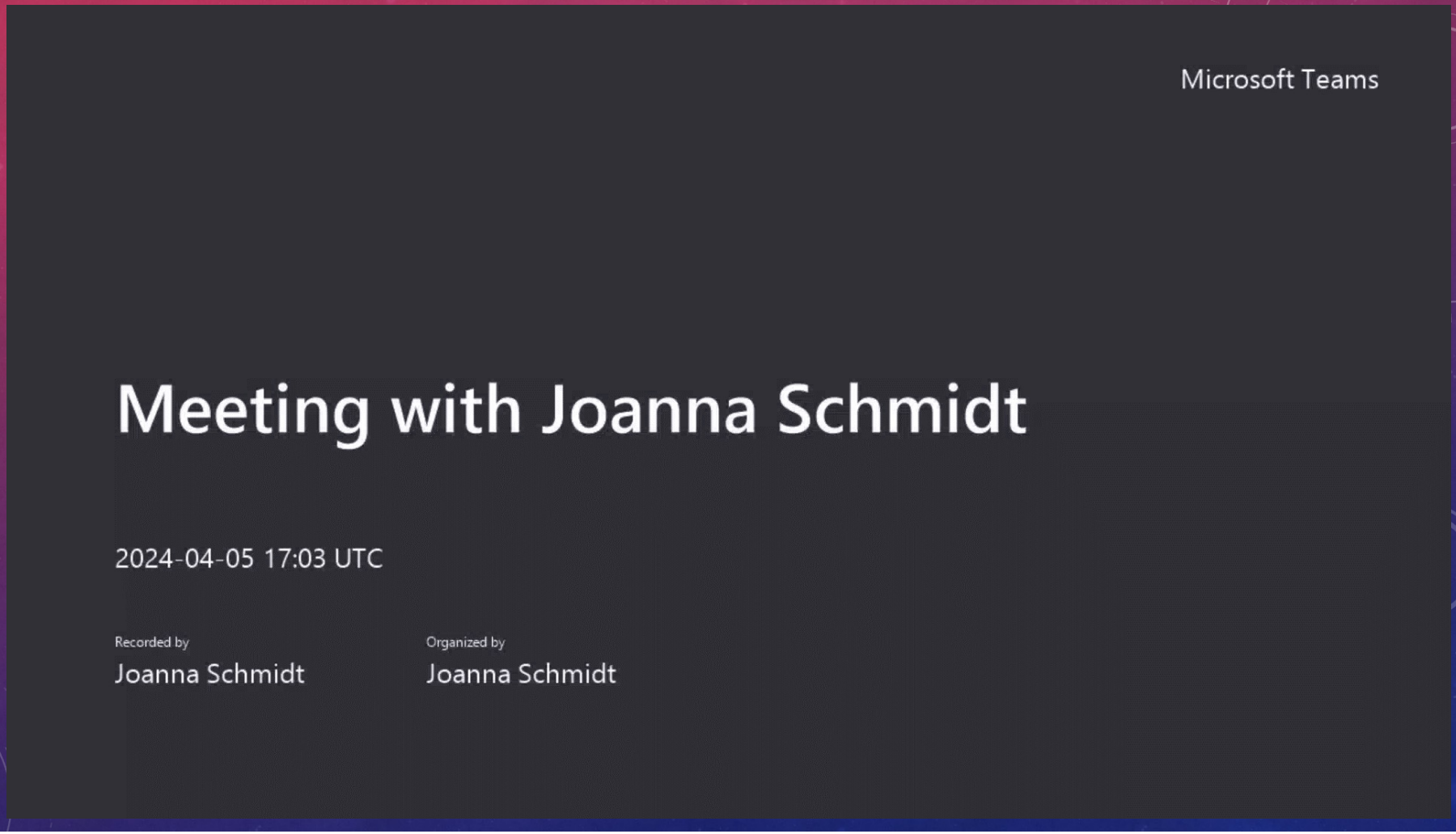
DOCUMENT UPLOAD

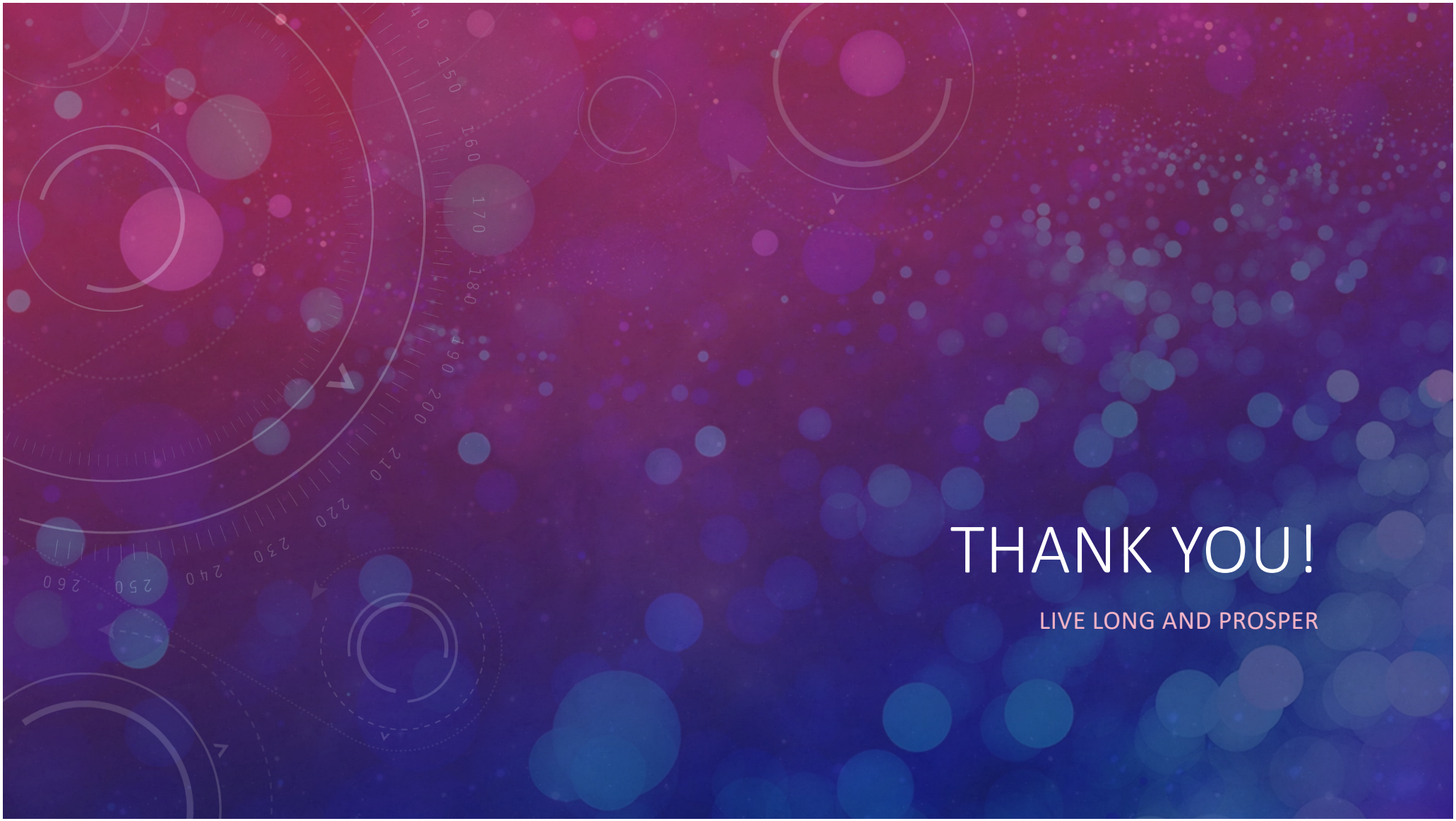


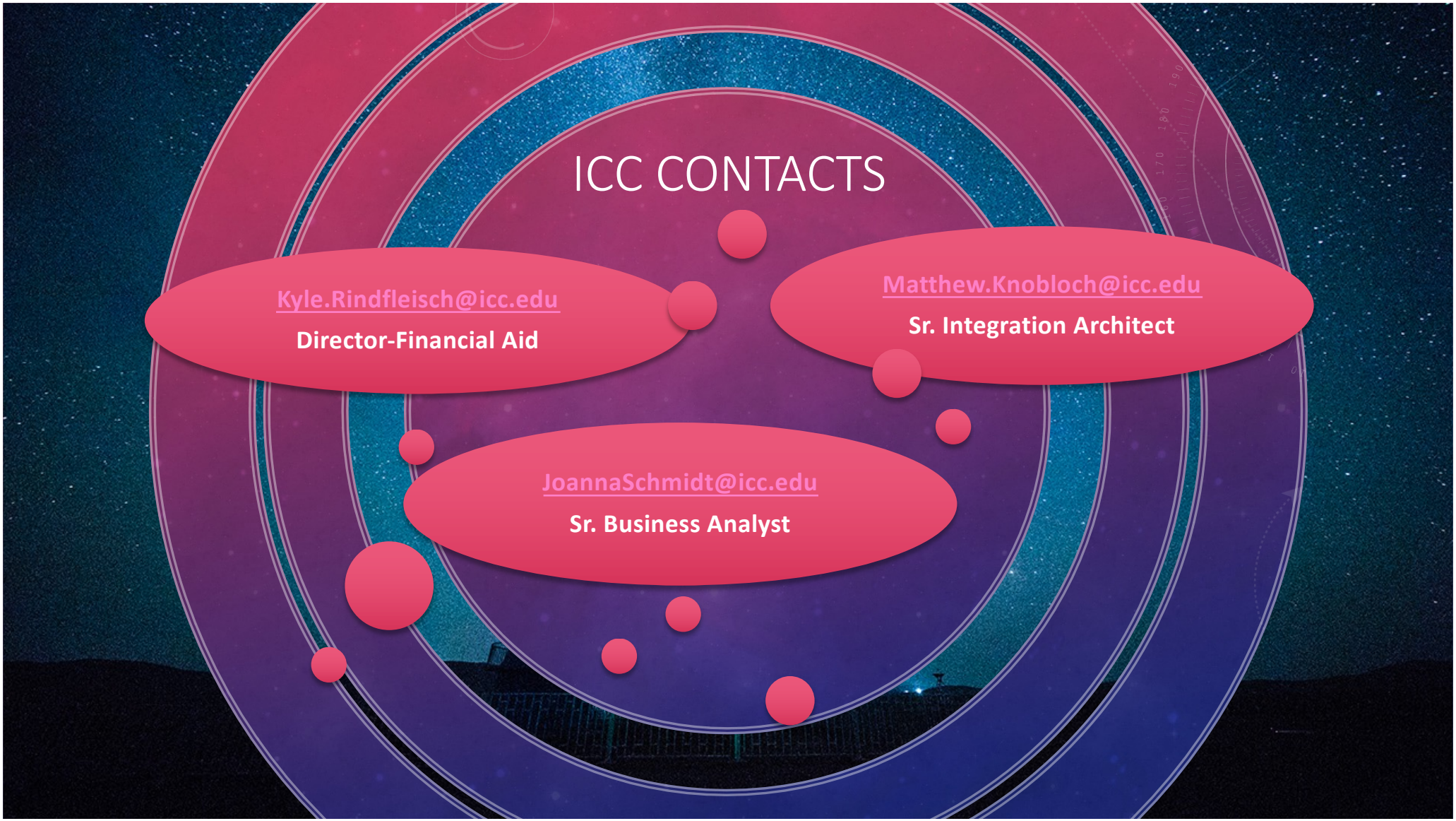
LOAN EFORM


Microsoft Teams
Meeting with Joanna Schmidt
2024-04-05 16:57 UTC
Recorded by
Joanna Schmidt
Organized by
Joanna Schmidt

THE WHOLE CREW




THANK YOU!
LIVE LONG AND PROSPER


ICC CONTACTS
Kyle.Rindfleisch@icc.edu
Director-Financial Aid
Matthew.Knobloch@icc.edu
Sr. Integration Architect
JoannaSchmidt@icc.edu
Sr. Business Analyst