

### **3.6.2 Correspondence**

The Financial Aid front counter team member services incoming personnel and routes general administrative correspondence to the appropriate staff member when needed. If an appropriate recipient is not identifiable, the correspondence should be given to the Director for evaluation and delegation.

Where appropriate, correspondence should be responded to within one week. If a staff member is responding to a specific complaint, it is typical procedure for the staff member to have the Director overview the correspondence. This allows the Director to be aware of potential problems.

### **3.6.3 Telephone**

In order to protect the privacy and identity of our students, the Financial Aid Office will only assist students and families who are able to provide proper identification when requesting personal financial aid information and in accordance with FERPA.

The following process will be used by the Financial Aid Office staff members: When assisting students, or approved individuals on the student's information release form, a picture ID and student ID number will be required.

Staff will make sure the provided information matches what is listed in the Banner system for the student. The Financial Aid Office expects that anyone else who has questions regarding a student's personal financial aid information, and is listed on the student's release of information form, to be able to provide this same information.

The outgoing email service to students will be through the SMCCCD email account. This is the preferred method for all email communication as students are responsible for who has access. We will respond to non-campus email accounts if the student is identified or the person is authorized on the Information Release Form.

Staff members are responsible for answering their individual telephone lines. Telephone calls are answered in a friendly and professional manner (Using the following as an example: Good morning/afternoon... Canada College Financial Aid Office, this is "Thanh" May I help you?). If the caller requires general information, the support staff member should respond. If the caller requires specific information, the staff member should screen the call thoroughly and transfer the information and caller to the appropriate individual. The person transferring the call should inform the call recipient of the following:

1. A summary of the caller's request/circumstances.
2. The caller's name and student I.D. number (if appropriate).

Each staff member is responsible for his or her own voice mail messages. Return

Development of policy on student payment deferments: who gives them, when and under what conditions.

Development of annual production schedule with computer center showing regular or special reports, dates needed and other relevant information.

Development of policy with registrar, and other departments on rendering services, such as transcripts, and grades, to students who are delinquent on certain payments to the institution.

Development of contingency plan if budgeted funds do not materialize or if expenditures exceed budget.

#### INFORMATION PROVIDED BY THE FINANCIAL AID OFFICE

Information on all initial financial aid awards and all aid adjustments made by the financial aid office showing students, type of award and amount.

Financial aid reports, news, legislation and changes in regulations that may be of interest to the Business Office

### **3.6 Records Management**

#### **3.6.1 Confidentiality of Records**

SMCCCD intends to fully comply with The Family Education Rights and Privacy Act (FERPA). FERPA affords students certain rights with respect to their education records.

These rights include:

(1) The right to inspect and review the student's education records within 45 days of the day the college receives a request for access.

A student should submit to the registrar, dean, head of the academic department, or other appropriate official, a written request that identifies the record(s) the student wishes to inspect. The college official will make arrangements for access and notify the student of the time and place where the records may be inspected.

If the records are not maintained by the college official to whom the request was submitted, that official shall advise the student of the correct official to whom the request should be addressed.

(2) The right to request the amendment of the student's education records that the student believes is inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.