



# Financial Aid Management Solutions

Freedom from time-consuming tasks and processes.

The financial aid environment is changing and we're here to support students and schools with Financial Aid Management Solutions that streamline the processes and manage the changes that can frustrate your students and chip away at your schedule.





Our financial aid management solutions reduce complication by providing intuitive, supportive tools for students and time-saving services for financial aid offices.

## Verification Gateway

**Transforming verification to give you time savings and flexibility.**

The Verification Gateway platform is an intuitive, automated solution to gather information and documentation required to verify students for Federal and institutional financial aid. The system utilizes smart technology progressively adding rules to automatically approve verifications or separates those that need further review.

### Improve Student Experience

Verification Gateway intuitively guides students and parents through the verification process. With easy-to-follow alerts and task lists, they know what documentation is needed, when it's due and when they've completed their requirements. There are even helpful tips along the way.

### Extending Personal Contact

The verification team personally manages all email and call center student and parent contact. Our experts are here to extend the quality of service your students expect at your institution.





### Increase Flexibility for Financial Aid Staff

Financial Aid staff can spend less time on busywork and gain more time to focus on students. Using the administrator portal, Verification Gateway grants school staff the freedom to check on verification progress wherever they are and whenever they want. Maximizing resources with our full-service team, extends your reach and allows you to focus on other priorities.

### Enhance Effectiveness

Verification Gateways offers schools a means to award students faster; reduce compliance risk and incoming call volume; and increase efficiency — all while improving student satisfaction.



## We Keep You Moving

Changing regulations and requirements can be disruptive to the service you provide students.

Our team keeps a close eye on regulatory changes that could impact your students and office. Inceptia solution and service flexibility enables us to make timely adjustments to help manage changes in requirements. This means you can stay focused on your student needs rather than technology or regulatory challenges.



## PJ Advisor

### **Uncomplicating financial aid review requests for faster resolution.**

PJ Advisor empowers students to quickly and efficiently submit documentation regarding their financial situation when they are impacted by special circumstances. Wherever they are and whenever they need it, PJ Advisor is available on any device allowing the student to focus on their academics rather than worry about how they are going to pay for college.

#### **Improve the Student Experience**

PJ Advisor's secure and device-responsive platform delivers an intuitive self-service solution that guides students step-by-step through the professional judgement request process. As they complete their request, they are prompted to digitally upload the situational documentation while following their task list. Helpful reminders along the way show progress and keep them on track. Once complete they simply e-sign and submit.

#### **Choose Your Process**

With PJ Advisor's flexibility, you can utilize our knowledgeable team to review the applications for accuracy and completeness before you review for a final decision or you can utilize the PJ Advisor streamlined platform to manage the entire process in your office.

#### **Expedite Appeals**

Pre-screening questions and a guided application process takes the guesswork out of what to gather and how to submit. Creating a standard process with room for individual considerations ensures all information has been gathered enabling a holistic and efficient review.

#### **Review & Approve Virtually**

School administrators have access to applicant statuses, details on the information submitted, and when ready, completed appeals are reviewed through a central dashboard. Administrators can also customize requests for additional information or types of aid within the platform and respond accordingly when a decision has been made.

#### **Streamline Document Management**

All documentation is collected through PJ Advisor into one student file eliminating gathering and sorting for the financial aid office for more convenient review. Schools can review requests individually or in a full download. Progress is easily trackable through the client dashboard.

## SAP Advisor

**Automating the Satisfactory Academic Progress appeals process to improve student development.**

SAP Advisor offers a fully-automated virtual platform that provides students and the financial aid staff the tools to effectively complete the SAP process and appeals quickly and seamlessly.

### Streamline the Appeal Process

SAP Advisor provides a dynamic platform for students to guide them through the appeal process via an intuitive virtual appeal submission that helps them pinpoint their specific situation and gather the most appropriate documentation.

### Promote Completion

The user-friendly portal offers an improved user experience to ease anxiety. Step-by-step instructions intuitively guide students through the process to collect the information for their specific situation. Added reminders encourage completion to boost retention.

### Manage the Academic Plan

If an academic plan is required to supplement the appeal process, SAP Advisor provides an online portal for students to upload and keep track of their plan as part of their overall document submission.

### Increase Effectiveness

Proactively choose the students that need to be contacted and SAP Advisor automates the document collection, organization and review process, increasing the efficiency of your office and removing the paper filing.

SAP Advisor guides students to gather more acceptable and complete information, personalized toward the specific appeal situation.







## Loan Summary

### **Increasing borrower awareness.**

While loan repayment is suspended or even if loans are forgiven, a lack of mindful borrowing can lead to trouble for students and schools. Loan Summary provides the nudges students need to keep smart borrowing on their mind.

### **Promotes Positive Contact with Financial Aid Offices**

More informed students know when to reach out, meaning more opportunities to offer support throughout the student lifecycle. Whether it's identifying issues or simply providing a stronger sense of attachment to the institution, the effect is a positive impact on student persistence.

### **Boosts Course Completion & Corresponding Retention**

Students that are in control of their financial futures can better manage their other priorities which leads to increased course completion, increased credits completed, overall persistence, and, interestingly, an increase in Grade Point Average — all contributing to greater retention rates that lead to degree attainment, a positive for both students and institutional revenue.

### **Improves Borrowing Behaviors**

When used in conjunction with financial education programming, students leave school with more manageable levels of debt and a sense of empowerment to build financial wellness. For schools, this can contribute to future outcomes like improved Cohort Default Rates — a positive as schools face increased repayment scrutiny via resources like the College Scorecard.

### **Fulfills State-to-State Regulatory Requirements**

Loan Summary satisfies state reporting requirements where laws have been passed requiring such communication.

**The simple act of providing loan summaries can change the trajectory of a student's financial future.**



## Superior Client Service & Reporting

The Inceptia Client Service team is here to support you every step of the way beginning with a detailed onboarding process to review our products in detail, review reporting and set up all promotional marketing materials.

We follow-up the onboarding with a check-in call to review reports, track progress and answer any questions that have come up as you implement our solutions into your office processes.

Over the course of our partnership, the Client Services team will maintain close communication with your team to review progress and provide assistance. The team is available by phone and email to support your needs.

**Working smarter, not harder, is at the heart of every solution Inceptia offers. Our commitment to uncomplicating processes, combined with our goal of creating the best user experience for you and your students, means you can count on us to be your efficient, forward-thinking partner in managing your workflow so you can build human connections.**



## High Data Security Standards

We're dedicated to protecting the security of all data and the privacy of student borrowers. All contacts and communication are monitored for accuracy, service and compliance. A secure website is used for uploading data and reviewing reports.

Inceptia is a TECH LOCK® Certified: Service Provider. TECH LOCK Incorporated, a nationally recognized data security and regulatory compliance firm, has awarded its certification to NSLP for compliance with FIPS 200 (Minimum Security Requirements for Federal Information and Information Systems) and FISMA NIST SP800-53 rev 4 (Recommended Security Controls for Federal Information Systems).



## Talk to Us

To learn more about the full capabilities of our Financial Aid Management Solutions, contact your business development representative, call 888.529.2028 or visit [inceptia.org](https://inceptia.org).



## We uncomplicate financial aid.

Inceptia is a nonprofit organization committed to innovative, effective and uncomplicated solutions for verification, financial aid management, smart borrowing, financial education and repayment wellness.



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