PROJECT SUCCESS: PROPOSED VERIFICATION SUPPORT PLAN

About one-third of students who submit the FAFSA are selected for Verification. Before they can receive financial aid, these students must provide further documentation and proof that the information they supplied on the FAFSA is accurate. For entering first-year, first-generation students and their parents who may have limited understanding of the process, verification poses a threat to their goals of college degree attainment. Trellis proposes assisting institutions with their verification efforts through the following communication and coaching campaign.

**Verification Communication and Coaching Support Plan**

The proposed verification support campaign will begin by assisting with outreach efforts to targeted students, utilizing a combination of text messages and virtual financial coaching. Messages will be informative regarding their selection, next steps, and access to virtual financial coaching. Students may receive sufficient information via texts to complete their verification. Other students may need a deeper dive and can schedule sessions with a Trellis financial coach.

Through Trellis’ financial coaches, students are assisted with any questions or issues they have regarding their verification. Once a student is supported, the coach will direct them to the institution’s financial aid office to finalize their verification. Below is a proposed plan for verification communication and support services.

|  |  |  |  |
| --- | --- | --- | --- |
| Outreach Method | Support Service | Objective of Communication and Coaching  | Information Required from the Institution |
| Text Message(Initial) | - Virtual Coaching- Online Resource | - Inform students of verification selection- Ease anxiety and/or confusion regarding selection- Inform students which documents to submit, where and how to get the documents, and the deadline- Explain to student that verification impacts ability to receive aid package- Direct student to virtual coaching, which can provide detailed guidance on how to complete the verification process- Provide link to a Trellis page with additional resources | - List of students selected for verification, their name, and SMS phone number-List of students based on type of  verification (when/if possible) i.e. household size, number in college, AGI- List of documents required from student/parents - Link to campus-specific documents (e.g. verification worksheet, non-filer document)- Deadline for submission- School information for common and frequently asked questions |
| Text Message(2nd attempt)2 Weeks Post-1st Text | - Virtual Coaching- Online Resource | - Remind student of their selection- Direct student to virtual coaching, which can provide detailed guidance on how to complete the verification process- Provide students with financial aid office contact for additional resource | - List of students who did not respond to initial text |
| Text Message(3rd Attempt)4 Weeks Post-1st Text | -Guidance on how to connect with the institution | - Direct students to financial aid office contact for assistance with process | - List of students who did not respond to initial text |

As previously indicated, this Verification communication and coaching support plan is a proposal and intended to solicit any feedback you may have. If you have any questions or concerns, please feel free to communicate with your Institutional Support Consultant.