

# Expanding what's possible with on-demand applications

How Rensselaer Polytechnic Institute partnered with CollegeVine to launch a financial aid agent that powers a deposit and melt tracker its enrollment team runs



# Where students go quiet

A deposited student with an unopened aid package is often stuck on a form he does not understand, waiting to talk it over with a parent who works days, in a week when the aid office has a line at the counter.

RPI focused on the points in the summer where students stop moving, and asked what it would take to move them.

*“The question is not where can we deploy an agent.  
It is where are our students getting stuck.”*



**Wendy Lin-Cook**

Vice Provost in Enrollment Management, Rensselaer Polytechnic Institute

## WHERE THE SUMMER STALLS

01

### The package is never opened

Awards go out, and nobody knows which students have actually read theirs

02

### Documents sit outstanding for weeks

A verification form, a loan step, a signature, each one blocking registration

03

### Families decide at night

Money conversations happen on evenings and weekends, when no counselor is on the phone



VERA

## Meet Vera, the financial aid agent

Vera went live in January 2026 and has run through the full cycle since. She reaches students by phone, text, and email, and walks the student through the necessary steps.

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**3**

weeks from kickoff to live

**3**

channels: phone, text, email

### THE RESULTS · JULY 2026 OUTBOUND WAVE

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**653**

students reached over email, text, and phone

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**312**

engaged with Vera directly, 48% of those reached

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**130**

cleared their aid blockers within 5 days

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**51%**

of inbound interactions handled after hours

# A 27-minute call, and 6 documents cleared

A student had 6 documents outstanding, a financial aid package he had never opened, and no fall registration. Vera took him through the portal, explained what accepting a loan commits him to, waited while he checked with his father, and picked the call back up where they left off.

## COMPLETED ON THE CALL

RPI • FINANCIAL AID

Award Letter 2026–2027

Accepted

Jun 14, 2026

STUDENT

Marcus Webb

ID 10038452

TOTAL AID

\$12,500

Grant + Loans

LOAN TYPE

Direct Subsidized

5.50% fixed rate

DISBURSEMENT

Fall + Spring

\$6,250 per semester

RPI • FINANCIAL AID

Entrance Counseling

Required for first-time Direct Loan borrowers

MW

Marcus Webb

Enrolled Jun 15, 2026

Progress — 1 of 3 modules complete

33%

✓

Understanding your loan obligation

Complete

🕒

Managing repayment & avoiding default

In progress

🔒

Rights, responsibilities & resources

Locked

RPI • FINANCIAL AID

Master Promissory Note

Federal Direct Loan Program • Legally binding agreement

Signed

Jun 16, 2026

STUDENT SIGNATURE

Marcus Webb

Signed electronically • Jun 16, 2026 • 2:47 PM EST

VERIFIED VIA

StudentLoans.gov

FSA ID authenticated

BORROWER

Marcus Webb

ID 10038452

COVERS

\$5,500

Subsidized + Unsubsidized

VALID THROUGH

Jun 2036

10-year term

DOCUMENT ID

MPN-26-10038452

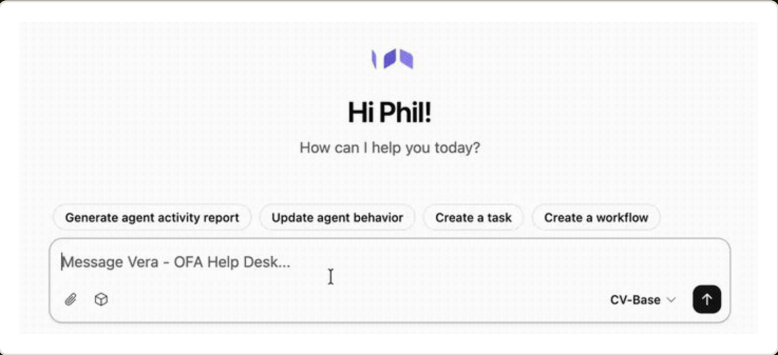
Federal record

# Every conversation becomes data the team can act on

The RPI team wanted to maximize this new data to improve yield. The team calls it SAIL data: Student AI Interaction and Learning. Every question a student asks Vera, every topic he raises unprompted, gets captured and structured next to the Slate record.

|            |                                                                          |
|------------|--------------------------------------------------------------------------|
| Slate      | What the student has submitted, and what is still missing                |
| SAIL       | What the student is asked about, worried about, and never followed up on |
| Admin View | Both, queried in plain language against live data                        |

## ADMIN VIEW



Staff ask Vera's console for the report instead of filing a request for it.

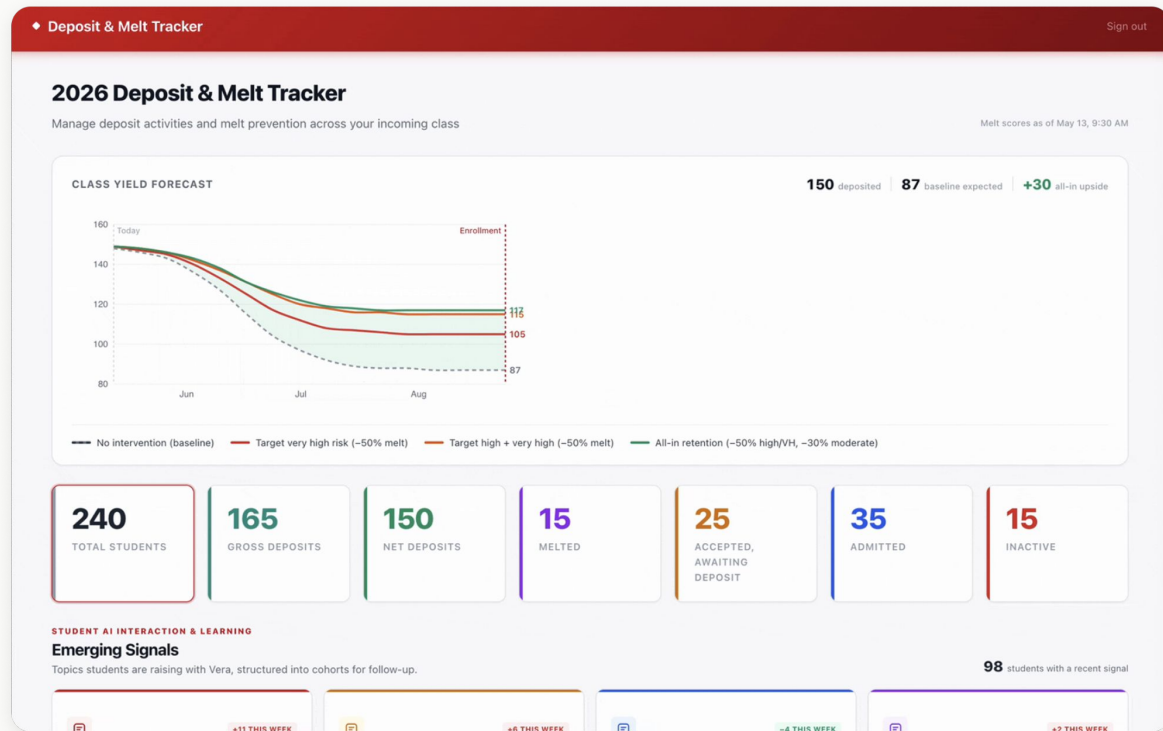
# The melt tracker turns status into a call list

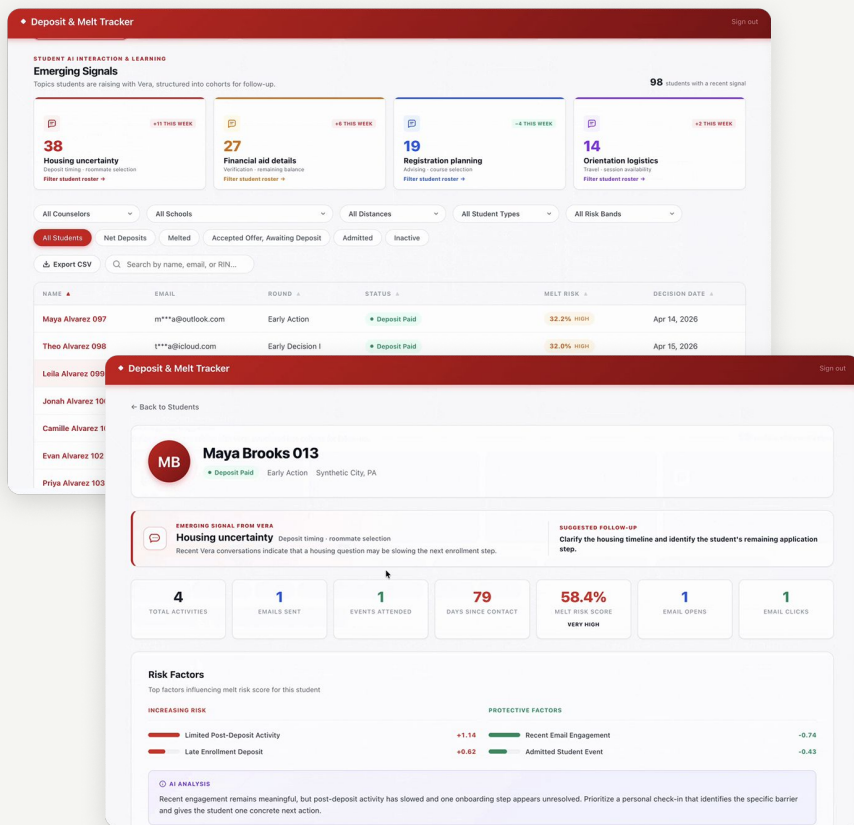
RPI and CollegeVine built this dashboard together on top of the Admin View. It shows the incoming class at the student level, with no need for a report request or query.

The at-risk ranking becomes this week's call list

A student stalled on housing becomes tomorrow's outreach

Topics students raise with Vera arrive as cohorts to follow up





*“For the first time we have a record of what our students actually asked us. We spent years making decisions without it.”*



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