

How Rensselaer Polytechnic Institute is eliminating financial aid bottlenecks

Key benefits of using AI for financial aid operations

24/7 availability for students means financial aid questions get answered outside of business hours — critical when applicants span multiple time zones

Proactive FAFSA outreach at scale replaces manual, reactive reminder processes with automated multi-channel campaigns across phone, SMS, and email

Consistent, accurate guidance on complex financial aid processes like FAFSA completion, CSS Profile requirements, and aid package explanations

Staff freed for high-judgment work as routine inquiries are handled autonomously, allowing financial aid counselors to focus on appeals, special circumstances, and personalized advising

Rapid expansion to new use cases once the initial agent proves value — from FAFSA reminders to a full Office of Financial Aid help desk

The situation

Rensselaer Polytechnic Institute (RPI) is a private research university in New York serving ~7,000 students. RPI's Office of Financial Aid previously relied on admissions counselors to manually identify students with outstanding FAFSA and CSS Profile submissions and coordinate email-based reminders. The process was reactive, limited to a single channel, and couldn't keep pace with the team's goal of increasing completed FAFSAs by 350 among admitted students.

The CollegeVine solution

In Jan 2026, RPI launched a financial aid agent with CollegeVine. Following early success, RPI is expanding its agent capabilities into a general Office of Financial Aid help desk handling FAQs, SAP appeals, and inbound inquiries across all channels.

The results

333

constituents served (Feb 2026)

89.9%

email open rate

48.9%

are students seeking info (validating the financial aid agent's role)

“ We wanted a **modern approach to addressing traditional customer service needs and wants**. It was a short timeframe to launch our first project, and we are excited about the agent's ability to lead ad-hoc information campaigns, be an after-hours operator for basic questions, and personalize welcome statements.

“ We're looking forward to our agent meeting proactive "phone campaign" needs vs only sending emails in a timely manner. We believe that **schools that implement successful AI solutions** to assist enrollment management will **gain a market advantage** in the long run.

Martin Daniels
Director, Financial Aid

RPI