

Multi-agent collaboration across campus operations

How Roosevelt University partnered with CollegeVine to turn one enrollment pilot into a connected system of agents across financial aid, student services, and more.



Understanding the pain points first

Roosevelt is a private university in downtown Chicago, founded in 1945 on a commitment to access.

Instead of thinking where AI could be used, the team started with understanding pain points or points of friction in the student journey. They then prioritized based on where AI could assist in handling routine/mundane tasks thus freeing up staff to handle higher value tasks.

“Instead of focusing on AI, we focused on problems we wanted to solve using AI.”



Neeraj Kumar

VP of Information Technology and CIO, Roosevelt University

WHAT CAME BACK

- 1 Efficiency for one person or one office**
A small agent, built by the unit, that gives an hour back to whoever does the task today
- 2 Workflows that cross several offices**
Where one office cannot finish the job alone, and the student carries the request between them
- 3 Build versus buy**
Hiring and retaining forward-deployed engineers was not realistic, so Roosevelt partnered with CollegeVine instead

THE OPERATING MODEL

Implement and walk away does not apply

Roosevelt and CollegeVine talk in terms of days and weeks to launch an agent rather than months and years, and the work does not stop at launch.

Escalations are treated as gaps in the knowledge base rather than as the cost of doing business, which is how coverage keeps climbing.

“We are not looking for an agent to handle 100% of questions. Even if we can offload half the workload to an agent, that’s tens of thousands of fewer emails and voicemails each year the financial aid staff need to handle.”



Neeraj Kumar

VP of Information Technology and CIO, Roosevelt University

AGENT 01 · ENROLLMENT

The pilot ran at the front door

A prospective student calls admissions about a program. Normally that means a note in Slate and a spot in line behind forty other students waiting on the same counselor. The first agent Roosevelt and CollegeVine built handles the whole arc: it runs email, phone, and text campaigns.

One call ran 8 minutes. The student, guarded at first, ended up telling the agent things the enrollment team doubted he'd say to a person. As this realization hit, it became apparent the work needed to expand beyond enrollment.

TRANSCRIPT AND APPLICATION REVIEW

TRANSCRIPTS

3,842
processed

APPLICATIONS

5,106
cross-referenced

MATCH ACCURACY

98.2%
credit mapping

HOURS SAVED

202
this cycle

Processing Volume by Week



Flagged for Review

Documents requiring manual reviewer attention

↓ 67% since week 1



Current Flags by Reason



AGENT 02 · FINANCIAL AID

Reduction in seasonal hires to support students

Every summer, the aid office hired part-time help to survive its own call volume. This spring, the office and CollegeVine built Roosevelt's aid knowledge into the agent and went live in April. By May, the team trusted it enough to see a significant reduction in seasonal hires.

A student writes in confidently that she has filed her FAFSA. The agent asks “which year?” — and that one follow-up is the difference between an award and a hold on July 31. A front desk with a line out the door rarely asks it.

66%

of incoming calls handled by the agent

2,000

of 3,030 replies without escalation

0

seasonal staff hired in April and May

A PAYMENT DEADLINE, TEN WEEKS OUT

The screenshot shows a web browser window with the address bar displaying "my.roosevelt.edu/financial-aid". The chat interface has a dark blue header with the agent's name "Fala" and title "Roosevelt Financial Aid Services", along with a status indicator "Online now". The chat history shows a timestamp "Today 2:14 PM" and the agent's name "Roosevelt Financial Aid Services".

The first message from the agent (Fala) reads: "Thanks for your Fall 2026 registration at Roosevelt! Reminder: **payment arrangements must be made by July 31st** to stay financially cleared. Options include financial aid (FAFSA), the monthly payment plan, ROOSTR, or a direct bill voucher. We're here to help." This message is timestamped "Proactive outreach · 2:14 PM".

The student's first response is a blue bubble asking: "Does FAFSA cover any of my classes?" This message is timestamped "Sent 3:02 PM".

The agent's second message responds: "Yes! The FAFSA determines your eligibility for federal aid — grants like the Pell Grant, federal loans, and work-study — and those funds apply directly to your tuition and fees. You can see your Fall 2026 award in RU Access at my.roosevelt.edu. **Have you had a chance to complete your FAFSA for Fall 2026 yet?**" This message is timestamped "Replied instantly · 3:02 PM".

The student's second response is a blue bubble asking: "I did it at the beginning of the year of 2026, do I have to complete another FAFSA for fall?" This message is timestamped "Sent 3:04 PM".

The agent's third message responds: "Great question — this trips up a lot of students! A FAFSA filed in early 2026 was likely the **2025-26 FAFSA**, which covered Spring and Summer. For Fall 2026 you need the **2026-27 FAFSA** — it's open now at studentaid.gov, school code **001749**. If RU Access shows a Fall 2026 award, you're all set; if not, complete it as soon as you can." This message is timestamped "Replied instantly · 3:04 PM".

At the bottom of the chat window is a text input field with the placeholder "Type a message..." and a blue circular button with a white paper plane icon for sending the message.

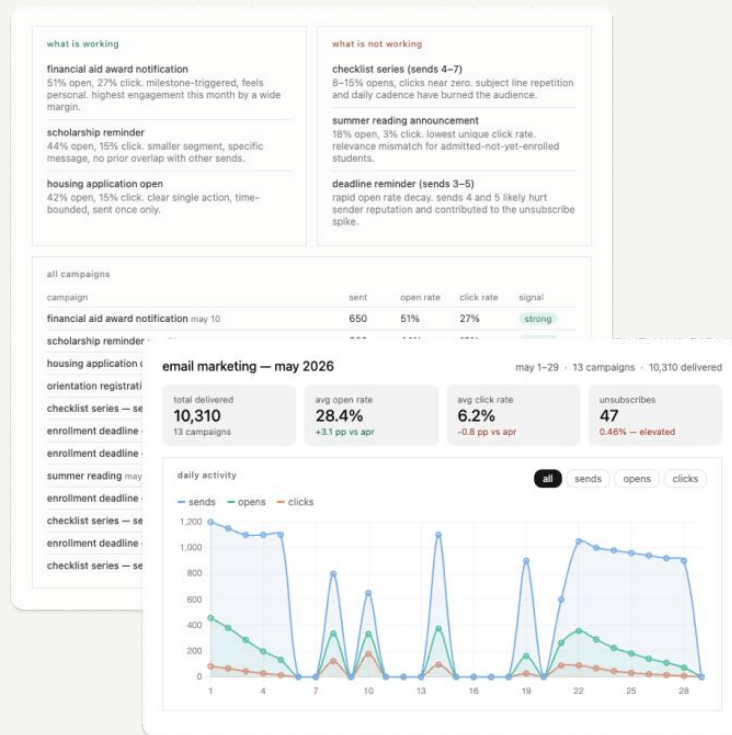
AGENT 03 · SLATE ANALYST

Full access and control over the team's Slate CRM data

Roosevelt described what it wanted from its Slate data, and CollegeVine had a working agent the next morning. A couple of weeks of testing later it was fully live.

Today, the enrollment leadership team uses it regularly to identify insights across all Slate data and take immediate action. The Roosevelt team as a result is ready to roll out all new projects that CollegeVine has introduced.

INSTANT REPORTING



Fala answers for every office at once

If a student has a question, they might not know where to start. Roosevelt solved that once by putting every office in one room; with CollegeVine it built a connected help desk that students can seek for all inquiries. Answering for every office is also what pushed the partnership into shared orchestration, governance, and security.

1,125

conversations in 10 days

2,094

messages from students

45%

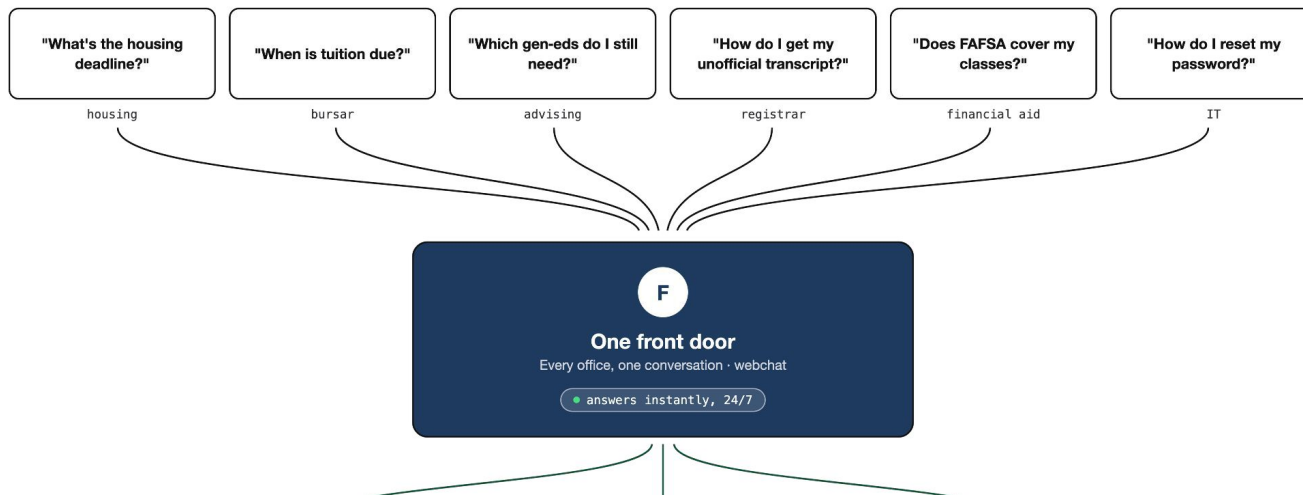
outside 9am to 5pm

219

weekend messages

Easy questions, one source

Common student questions, organized and answered instantly by a single front door



WHAT'S NEXT · THE ONTOLOGY LAYER

One operating layer over Banner, Slate, and the LMS

The agents live today answer from a knowledge base, which gives every student the same answer. The next step is for the agents to tailor answers or actions according to each student's own record.

Roosevelt and CollegeVine are tackling this by building an ontology layer across Banner and the systems around it. Five agents are live today and seven more are in testing or development.

Course Scheduling (non-agent) Academic Affairs ● Launched	Prospective Student Outreach Enrollment ● Launched	Recruitment Outreach Missions Enrollment ● Launched	Financial Aid Helpdesk Financial Aid ● Launched	Slate Analyst Enrollment ● Launched
Graduate Recruiter Enrollment ● In testing	Student Hub (Phase 1 AIOS) Student Services ● In testing			
SEP Creation Academic Affairs ● In development	Graduation Application & Audit Academic Affairs ● In development	Transfer Credit Evaluation Enrollment ● In development	IT Helpdesk IT ● In development	NCAA Compliance Athletics ● In development
Transcript Processing Enrollment ● Up next	FAFSA Verification Financial Aid ● Up next	Billing Collections Financial Aid / Bursar ● In discovery		
Withdraw Automation Academic Affairs ● Future stage	Raiser's Edge Analyst Advancement ● Future stage	Work Study Matching Financial Aid ● Future stage	Document Collection & Verification Financial Aid ● Future stage	Contract Management Legal ● Future stage
Student Hub (Phase 2 AIOS) Student Services ● Future stage	Attrition Risk Monitoring Student Services ● Future stage	Student Retention Check-Ins Student Services ● Future stage	Banner Analyst Student Services ● Future stage	Student Compliance Concierge Student Services ● Future stage