

Executive Summary

Request 3.2.1 – OU Bound Financial Success Plan

Updated 2/14/2018

All incoming direct from high school students are now required to submit (and have approved) their financial success plan during their onboarding process (there is no longer the option of the \$1000 payment OR the financial plan, it is required for each student).

As a part of the OUBound initiative, this request is for the creation of a daily feed to personalize an automated app to help students create their student success plan.

All incoming direct from high school students are required to submit a Financial Success Plan during their onboarding process. The current Financial Success Plan was built with freshman in mind. In addition to all incoming freshman, we would like to expand the Financial Success Plan to all current OU students so they also have the opportunity to gain a better understanding of paying for college. The student's estimated Cost of Attendance will be presented in an easy-to-understand format with a list of their federal awards, if any, and their expected gap. Students will be matched with a Money Coach and resources will be provided for students on ways to close that gap.

Financial Success Plan 2.0 will also allow students who have been awarded federal aid to see their award letter online with the ability to print a PDF of their award letter. Printing award letters will streamline the process for those students who need to verify federal funding before their tribal grants can be processed. Students will be able to find information on federal funding, access all funding terms and conditions, and have access to the federal brochure outlining the rights and responsibilities of students receiving federal aid. In the new Financial Success Plan, students will also find links to Bursar and Financial Aid web pages, to direct them through accepting federal financial aid and adding authorized users, such as their parents, onto their Bursar account with ease.

This request is to enhance the daily feed currently being used to help incoming freshmen students create their Financial Success Plan and expand it to all active students on campus.

User Stories

- As an incoming student, I want to know how to complete my financial plan.
- As an incoming student (and/or the parent/guardian of an incoming student), I want a real-word idea of the cost of college with a genius/wizard to walk me through how I can pay for it.
- As an incoming student I want to know an estimate of what my costs will be, so I can be aware of what my family needs to do to pay for college.
- I want to be connected to campus resources such as a Money Coach or a Financial Aid Counselor who I know will be available to help answer questions I have about paying for college.
- I am a student who would like to find the details of my federal financial aid award.
- I am a parent, and authorized user, of an OU student. I would like to see an estimate of their Cost of Attendance and their gap for the upcoming year.
- Before sending OU my tribal grant, my tribe requires I provide a copy of my Cost of Attendance and list of awards OU has offered me. I would like an online location where I can easily find that documentation and print a PDF to satisfy that tribe requirement.
- I am a Law student who just got married. I can't remember how to set up an authorized user on my Financial Aid and Bursar accounts and would like a site with instructions and links on how to give my spouse access to my account details. An online portal would save me the time and hassle of having to call.
- I am a first-year student who would like to find the terms and conditions of my student loans as well as find the link to the federal loan website to do my entrance counseling.

- I am a Gateway instructor; I don't know much about financial aid, so I would like to have a central website that I can direct my students to if they have questions about their federal awards. This site should be able to help the student find the answer or direct them to the correct office to visit so they don't feel they have gotten the run-around.

Sample Application

This project involves a collaboration with Financial Aid, OAR, NextThought and the Graduation office to create an app like the Scholarship Genius to help students and parents put together a financial success plan.

This project involves a collaboration with Financial Aid, Bursar, OBA, Next Thought, and the Graduation office to create an app to help students and parents put together a Financial Success Plan. It will use some of the format of the incoming freshman Financial Success Plan, but add components that will be helpful to all OU students who will be receiving federal financial aid. The goal is to make create something that streamlines the award letter process, is easy for students to use, reduces confusion on federal aid, allows students to find correct information themselves: reducing student wait times in Buchanan, and provides students with a campus contact if they need to follow up. Final format of the app is still being worked on.

Delivery and Timeline

- **Delivery Method:** This data will be delivered nightly through a flat file. Files for the original FSP have already been built and are being delivered nightly, updated columns will need to be added to those files.
- **Timeline:** NextThought has requested to have the additional data before the April 2, 2018 go live.
- **Project Execution:** TBD, based on timelines. Report may be updated by ESFS team, scheduled with help from Appworx team, or may be updated by Data Services.
 - **Project Acceptance:** Upon DGCC approval, this will move to execution phase.

Data Validation Checklist

Request 3.2 – OU Bound Financial Success Plan

Updated 2/16/2017

Category 1: Financial Aid

- Method: Email
- Time stamp: 2/16/17
- Attendees/participants: Kathi Robinett; Chris Kennedy; JP Morgan
- Data Spec presented: v1.0
- Session Notes: N/A
- Validation Decision: Approval Granted
- Data Classification: Financial Aid
- Category Specific Items: N/A

Request 3.2.1 – OU Bound Financial Success Plan

Updated 2/16/2018

Category 1: Financial Aid

- Method: Email
- Time stamp: 2/15/2018
- Attendees/participants: Kathi Robinett
- Data Spec presented: v1.1
- Validation Decision: Approved, along with additional data which was in 1.0

Category 2: General

- Method: In Person
- Time stamp: 2/15/2018
- Attendees/participants: Chris Kennedy
- Data Spec presented: v1.1
- Validation Decision: Approved

Category 3: Admissions and Recruitment

- Method: Email
- Time stamp: 2/16/2018
- Attendees/participants: Susan Whyatt, Mark Arens, Chris Wallace
- Data Spec presented: v1.1
- Session Notes: Chris Wallace mentioned using Admission Application for TERM_ENTER_CODE and ADMISSION_TYPE_CODE based on the maximum admitted TERM_ENTER_CODE
- Validation Decision: Approved, along with additional data which was in 1.0

Data Specification

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v1.1 - Updated: 2/16/2018

Category	Attribute Name	Source (SOR)	Schema	Location
General	SOONER_ID	ODS	OUCUSTOM	PERSON_OU
General	CITIZENSHIP_IND	ODS	OUCUSTOM	PERSON_OU
General	CITIZENSHIP_CODE	ODS	OUCUSTOM	PERSON_OU
Admissions and Recruitment	RESIDENCY_IND	ODS	OUCUSTOM	STUDENT_ACTIVE_TERM
Admissions and Recruitment	ADMISSION_TYPE_CODE	ODS	OUCUSTOM	ADMISSION_APPLICATION
Admissions and Recruitment	TERM_ENTER_CODE	ODS	OUCUSTOM	ADMISSION_APPLICATION
Financial Aid	AID_YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_TITLE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_STATUS_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_STATUS_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_SOURCE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_SOURCE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_ANNUAL_OFFER_AMOUNT	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	AWARD_ANNUAL_OFFER_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	PACKAGE_COMPLETE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	PACKAGE_TRK_REQ_COMPLETED_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	ALL_REQUIRE_COMPLETE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_TYPE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_TYPE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_SOURCE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_SOURCE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FUND_DETAIL_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD

Financial Aid	LAST_UPDATE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	MAX_FAFSA_COMPLETE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FAFSA_NOT_COMPLETE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	FAFSA_NOT_COMPLETE_WHY	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	BUDGET_COMPONENT_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	BUDGET_COMPONENT_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	BUDGET_COMPONENT_AMT	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	REQ_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	REQ_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	REQ_STATUS_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD
Financial Aid	REQ_STATUS_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD

	Added in v1.1
	Additional data provided in 1.0
	Requested in 1.0, not needed/used