

Bowling Green State University
BG@100 Action Item
ESC Submission: February 25, 2008

Identification Information:

<i>Reference Number</i>	CSS-A006
<i>Functional Area</i>	Financial Aid
<i>Title</i>	Creation of custom solution to automate processing of student financial aid application data
<i>ESC Submission</i>	February 25, 2008
<i>ESC Decision Requested By</i>	February 25, 2008

Issue Description:

The loading of student financial aid applications and ensuring that all the required information is complete/correct for the applicants is an enormous task for the Office of Student Financial Aid (SFA). To reduce the staff time required to manage this task, SFA in conjunction with ITS created a custom solution in their current (Sigma/SAM) system that streamlines the process. Application processing in the PeopleSoft Campus Solutions Financial Aid module presents similar issues for the office. SFA would like a set of custom processes created in the PeopleSoft system which would assist them in the loading of student aid applicant data (FAFSA files), assigning of these applicants to specific groupings, and creation of automated communications.

Background Information:

The current BGSU Sigma/SAM customization assigns various codes to a student to identify how the application is to be recorded and processed. It also sends automated emails or letters to the student indicating when they have incorrect or missing application data. The customization will be replaced by using delivered PeopleSoft 3C functionality. However, the process to assign the various comments, communications, and checklists is cumbersome especially when numerous checklists or items need to be assigned or updated. With the volume of activity that SFA handles annually, a custom process is truly necessary. For example, SFA has loaded almost 22,000 applicant records for the 2007-08 aid year. Without this customization, approximately 80 different mass change processes would need to be developed and then executed every time these FAFSA files are loaded into CSS. This proposed customization automates one of the most menial and tedious tasks in PeopleSoft.

The majority of schools with significant application activity have automated processes in place for this function. Due to this fact, there are programs available from other institutions that can be obtained and used as a base to start with for our purposes. Obviously this would expedite the development time needed to create a custom process.

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Alternatives:

Alternative #1: Utilize PeopleSoft as delivered which will require SFA to manually create/run between 80 and 200 mass changes to assign and update checklists/items and communications, and to set various status flags on the student's packaging status summary page.

Alternative #2: Develop a BGSU custom solution to assign checklists/items, update checklists/item statuses, and set flags on the packaging status summary. The customization would be modeled on program code obtained from another institution.

Alternative #3: Develop a BGSU custom solution from scratch to assign checklists/items, update checklists/item statuses, and set flags on the packaging status summary.

The following table shows the pros and cons for the alternatives identified above.

#	Alternative	Pros	Cons	Notes
1	Develop mass changes and execute all manually	<ul style="list-style-type: none"> Requires no customization 	<ul style="list-style-type: none"> Time consuming and inefficient Potential for errors and duplicate items 	Can be developed on the fly by technical staff without significant programmer effort.
2	Modify an existing solution obtained from another school/s	<ul style="list-style-type: none"> Proven functionality Reduced development time 	<ul style="list-style-type: none"> Have to identify the external program/s with the best business practice that meets BGSU requirements May require merging two different programs from other school/s 	Will need to be scheduled for development.
3	Develop a custom program to assign checklists/items, update checklists/item statuses, set flags, and assign communications.	<ul style="list-style-type: none"> Will be designed around the BGSU processes Develop internal skill sets of development team 	<ul style="list-style-type: none"> Time required to completely develop the program may be considerable. 	Will need to be scheduled for development.

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Costs - Alternative #1: None, although staffing may become an issue.

Costs - Alternative #2:

Estimated Hours for Original Implementation	80 Hours	
Estimated Cost for Original Implementation	\$12000	Use \$150 times hours
Estimated Hours per Each Upgrade	10 Hours	
Estimated Cost per Each Upgrade	\$500	Use \$50 times hours

Costs - Alternative #3:

Estimated Hours for Original Implementation	160 Hours	
Estimated Cost for Original Implementation	\$24000	Use \$150 times hours
Estimated Hours per Each Upgrade	10 Hours	
Estimated Cost per Each Upgrade	\$500	Use \$50 times hours

Schedule Considerations:

Alternative #1 – While there is no development time, the amount of time needed to create the requisite mass change processes is significant.

Alternative #2 – Can obtain an existing modification and customize it fairly rapidly, permitting the process to be tested during ongoing modeling, testing, and training activities. Process needs to be production ready by **December 2008**.

Alternative #3 – Need to begin development of functional and technical specs immediately to allow for sufficient development and testing times. Final signoff for a production ready process is needed by **December 2008**.

Recommendation:

Alternative # 2

This solution allows BGSU to leverage their need for automated processes against the development activities already completed by other PeopleSoft institutions. This can reduce the development time and enhance the probability of a successful design by building on a foundation of proven customizations by other schools.

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Recommendation Supported By:

Name	Project Role
Tina Coulter	CSS Financial Aid Functional Lead
Jerry Ameling	CSS Financial Aid Technical Lead
Greg Guzman	Director of Financial Aid
Suzanne Fahrer	Associate Director of Financial Aid
Robbie deLeur	CSS Financial Aid Consultant

ESC Decision:

Bruce Petryshak for Alternative #2
Linda Dobb for Alternative #2
Shirley Baugher for Alternative #2
Camille Consolvo for Ed Whipple for Alternative #2
Sheri Stoll for Alternative #2

ESC Decision Date: February 25, 2008