
Best Electronic Practices

4 - year public institutions



Electronic Access Conference
emagine
2001

Oklahoma State University

Pat Kennedy

Scholarships and Financial Aid

Student Financial Assistance

THE U.S. Department of
EDUCATION



Our Agenda Today

- The OSU environment
- In the pursuit of
Technology Driven Best Practices
- OSU initiatives
- Questions



OSU At A Glance



OSU at a glance...

Students: Fall 2001

Total Enrollment	21,872
Undergraduate Students	17,211
Graduate Students	4,372
Veterinary Medicine Students	289



OSU at a glance...

Financial Assistance: 2000-2001

Program	Dollars	Students
Loans	\$57,796,080	8,733
Grants	\$17,237,803	5,793
Tuition/Fee Waivers	\$15,469,847	8,300
Scholarships	\$12,339,247	4,717
Employment	\$16,137,003	5,542
Total	\$118,979,980	16,658



OSU at a glance...

Tech staff

- System's Staff
 - System's Manager
 - Systems Specialists (2)
 - Hardware / LAN / Daily operations
 - Analysis & development
 - Both trained in Financial Assistance



OSU at a glance...

Financial Aid System

- SIS IA PLUS / FAM – SCT
 - Since February 1999
 - OSU's Y2K solution
 - Purchased by governing board for system
 - Eight sites
 - Common software and Data dictionary
 - Eight databases



OSU at a glance...

FAM Fund Codes

- Funds maintained in FAM 1,853
- Funds paid through FAM 1,398
- Institutional scholarship funds paid through FAM 1,104
- Tuition waiver funds paid through FAM 176

In the
Pursuit

Best Electronic
Practices

Student Financial Assistance

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System Philosophy

- Is the financial aid system for only?
 - Accumulating
 - Storing
 - Processing
- Or a tool that --
 - Enhances *services* to students
 - Promotes *efficiency*
 - Provides an *infrastructure* for change



Pursuit

Characteristics of 'Best Practices'



Characteristics

- Best practices require a willingness to change the way business is done.
- Best practices are relative.
 - Environmental considerations
- Best practices are additive.
 - Processes build upon processes.

Characteristics

- Best practices result from the efforts of people.
 - Best practices are generally a *team* effort.
 - Technology is not the source of best practices.
- Best practices *do not* require cutting edge technology
 - However some technologies are *critical* or *pivotal*.



Characteristics

- Best practices require:
 - Strategic planning ~ Incubation
 - Development
 - Deliberate Implementation
 - Evaluation
- Best practices requires occasional *failure*
 - Failure promotes learning
 - Condemnation stifles development



Characteristics

- Best practice implementation requires:
 - Leadership
 - Commitment
 - Investment
- The adoption of best practices is a marathon
 - Not a sprint
 - Everything does not have to be done at once.
- Best practices allow staff to focus on what is important
 - Not what is only urgent



OSU initiatives

OSU initiatives

- Quantifying Activity
- Documentation
- Disbursement
- PC Lab



OSU initiatives

OSU initiatives

- Master Promissory Notes
- E-Mail Technology
 - Loan Consolidation Campaign
- Scholarship Processing



OSU initiatives

Quantifying Activity



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OSU initiatives

Quantifying Activity

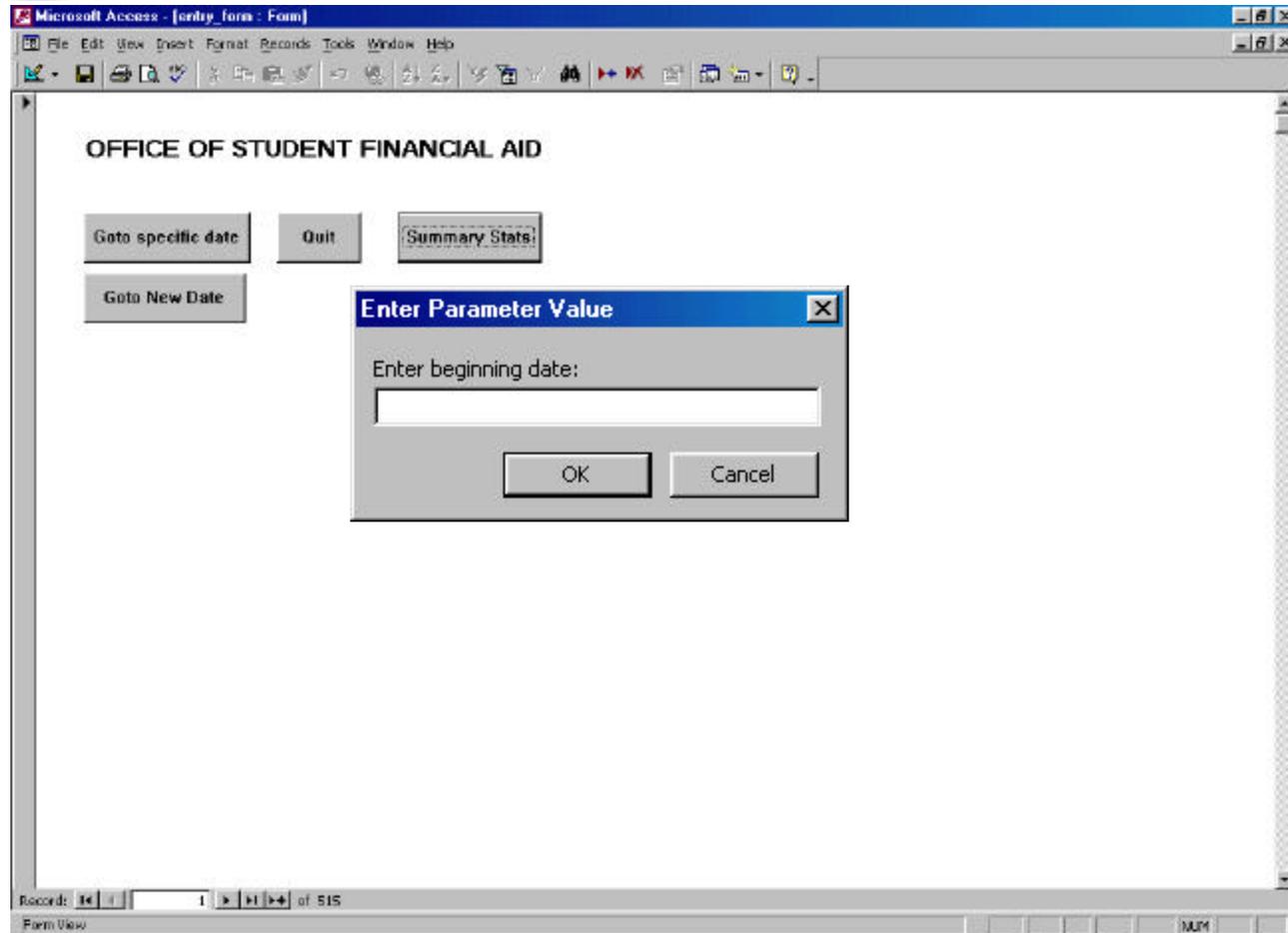
A screenshot of a Microsoft Access form window. The title bar reads "Microsoft Access - [ordny_form : Form]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. The toolbar contains various icons for file operations and data manipulation. The main area of the form is titled "OFFICE OF STUDENT FINANCIAL AID" and contains four buttons: "Goto specific date", "Goto New Date", "Quit", and "Summary Stats!". The status bar at the bottom shows "Record: 1 of 515" and "Form View".

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OSU initiatives

Quantifying Activity



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Quantifying Activity

Microsoft Access - [summary - Form]

File Edit View Insert Format Records Tools Window Help

From: 01/01/2001 To: 06/01/2001

RECEPTION			
Counter Contacts	10455	Test Waivers	0
Phone Contacts	12077	Web Page Hits	0
Short Term Loans	411	Emails	818

CONTACTS							
	PHONE	APPT	WALK-IN	EVALS	SPEC	MISC	TOTAL
Du. B	0	0	0	0	0	0	0
Walk	0	0	0	0	0	0	0
Walk	0	0	0	0	0	0	0
T.J	670	53	38	750	28	426	1979
K.B	2234	166	37	596	47	881	3964
K.F	723	131	44	525	34	644	2090
L.M	2249	138	88	269	14	2257	5023
L.W	2455	94	47	507	40	1452	4595
TOTAL	8321	596	259	2576	153	5668	17053

WORK STUDY	
Phone Contacts	579

DATA ENTRY	
Schol	2733
ISIR's	302
Phone Calls	305
Folio Out	221
File Worked	63

REPORTS	
Phone Contacts	1918
EA Forms	234
Online Disb	1417
Time Sheets	539
Refund/Payp	383

FILEROOM	
Evals	2225 Done
Make Files	1975 Done
Updates	1770 Done
Ratios	4285 Done
Flowing	345 Done
Files Out	816 Done
Apps	560 Done
Phone Calls	346 Done
Letters Mailed	29907 Done

LOANS									
	Staff	Plus	Ovred	Aggr	DL	Loan Ad.	Lts. Ad.	Non Fed	Phone Calls
Jani	1038	185	558	238	501	308	1150	58	1293
Randy	8	16	0	0	1273	0	142	0	506
Cathy	457	267	748	15	312	963	0	0	1086
Totals	1851	468	1344	243	2088	1303	1292	58	2981

SCHOLARSHIPS				
Receipt	Sando	Sandy	Kevin	Total
Phone	5085	684	258	0
Apps	0	0	0	0

Direct Loans			
Counter Contacts	1107	Manual	On-Line
Phone Contacts	1153	Entrance Interview	33
Phone Notes Printed	1120	Exit Interview	738

Records: 84 of 1

Form View



OSU initiatives

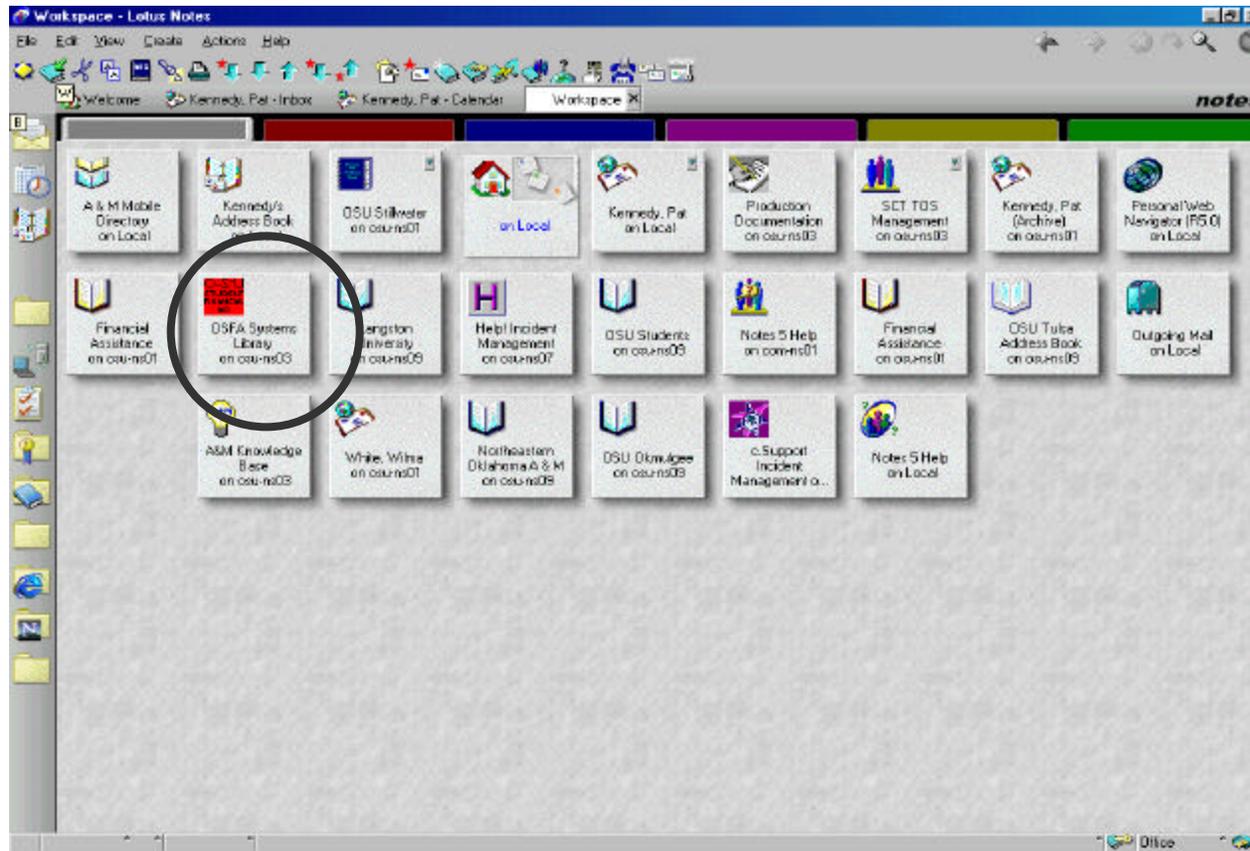
System

Documentation



System Documentation

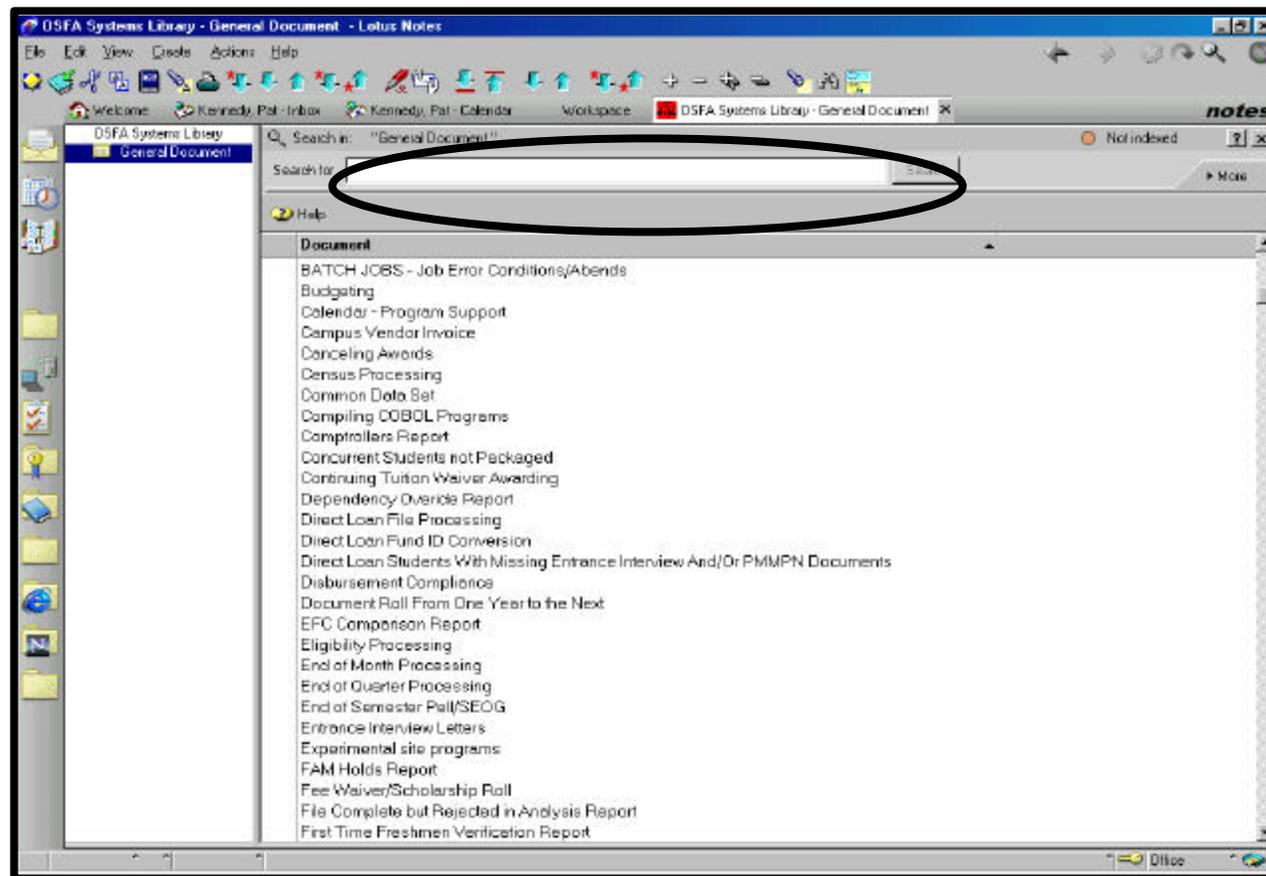
OSU initiatives





System Documentation

OSU initiatives



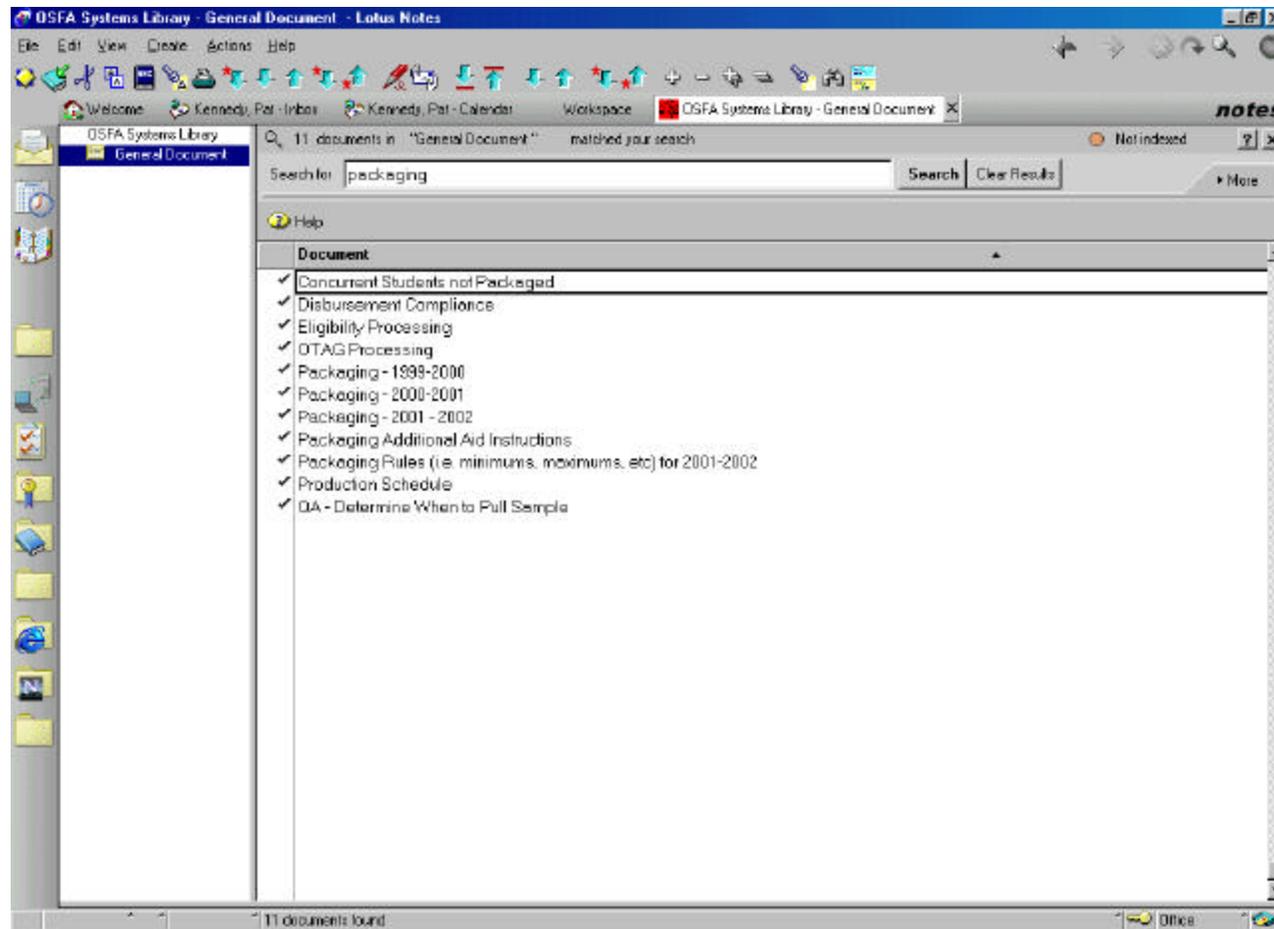
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System Documentation

OSU initiatives

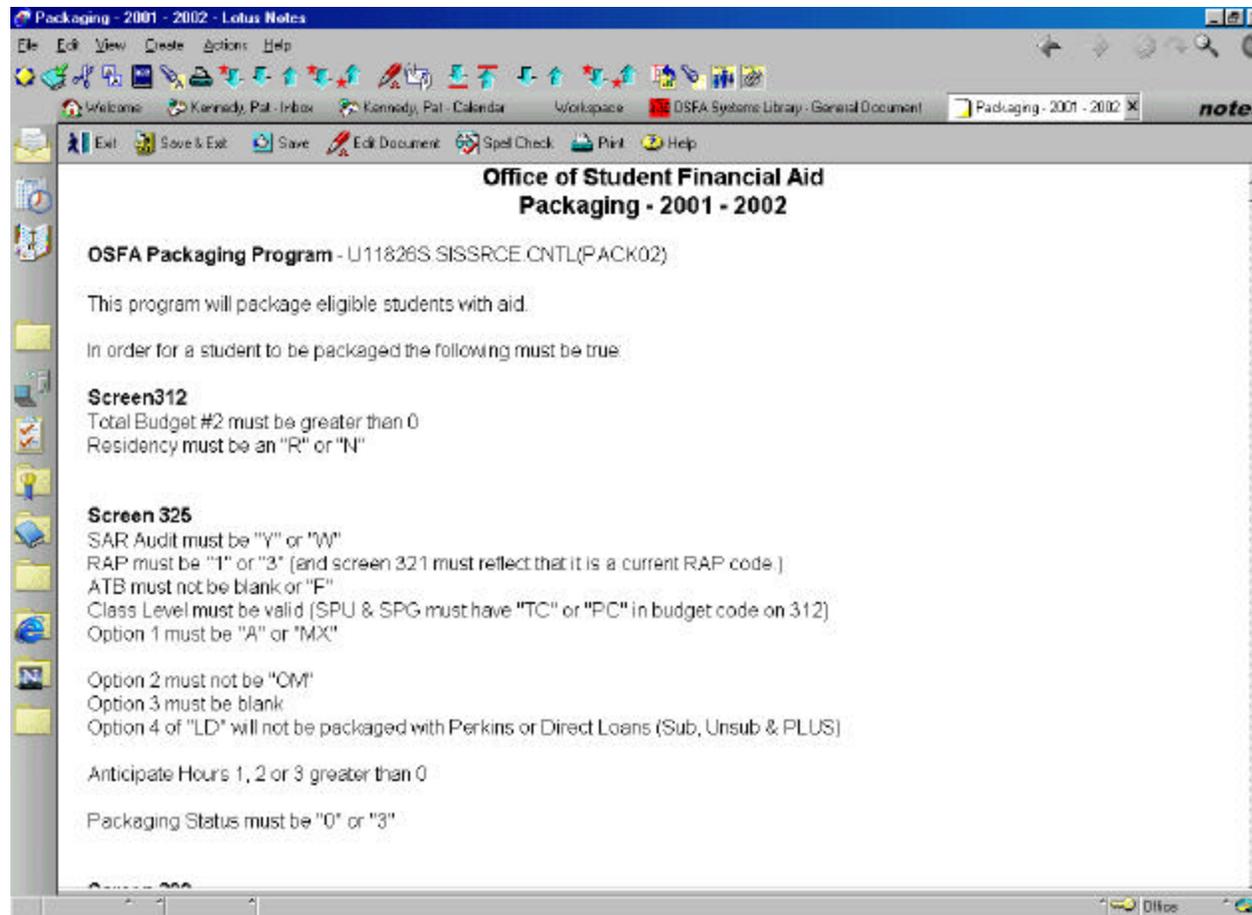


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System's Documentation

OSU initiatives





OSU initiatives

Disbursement Enhancements



Disbursement Enhance Objectives

- Allow distributed entry and maintenance of scholarships and tuition waivers.
- Ensure student eligibility for scholarships and tuition waivers at the point of disbursement.
- Minimize number of manual adjustments to tuition waivers.
- Minimize changes required to base FAM products.



Scholarship & Tuition Waiver Disbursement

Tuition Waivers

paid via FAM: \$15,000,000 9,800 awards

Scholarships

paid via FAM: \$4,500,000 4,500 awards



OSU initiatives

Modifications Required for Distributed Award Entry



Award Entry

Award Entry Screen

- Replicate existing screen functionality.
 - Added security enhanced (value-based).
 - Added disbursement controls (BR feed flag)
 - Added override values for hours enrolled

Award Entry

2 - TEST

File Edit Transfer Fonts Options Macro View Window Help

3C7 AWARD DISTRIBUTION TEST, JOHN DOE

Screen: SID: 000000001 Yr: 02 AwPd: 02A Disb: 02C Loan: Fund: 88672

Tran: Mnem: ENGRT Lender: P: Msg: Total:

	Amount	Offer	Accept	E/P	Disbursement Status
AUGUST	_____	.00	.00	.00	Not attempted
SEPTEMBER	_____	.00	.00	.00	Not attempted
OCTOBER	_____	.00	.00	.00	Not attempted
NOVEMBER	_____	.00	.00	.00	Not attempted
DECEMBER	_____	.00	.00	.00	Not attempted
JANUARY	_____	.00	.00	.00	Not attempted
FEBRUARY	_____	.00	.00	.00	Not attempted
MARCH	_____	.00	.00	.00	Not attempted
APRIL	_____	.00	.00	.00	Not attempted

Totals: .00 .00 .00 Award Status:

Limit Calc Ovr: Br Feed Flag: _



Value based security

- Added elements to the Fund attribute file
- Operator Security attributes
 - Level 1: Operator's college / agency
 - Level 2: Operator's department
 - Level 3: Additional attribute (if needed)
- Modification to Fund Management Screen
 - Maps fund to specific user department / college



331 Fund Attribute

ENGINEERING TECH SCH

Screen: ___ SID: _____ Yr: ___ AwPd: ___ Disb: ___ Loan: ___ Fund: 88672

Mnemonic: ENGRT Description: ENGINEERING TECH SCH

Account 1: 6026009210 2: 0190102205 Notes: 0

S1: CEAT S2: ETECH S3: DJ AUTHORIZED ADMIN GROUPS: _ _ _ _ _

***** FUND SPECIFICATIONS *****

Aid Source:	P	PARS Feed:	Y	Meet Need:	Y	BR Feed:	Y
Award Class:	G	PARS Rpt:	N	SEP Required:	N	Aggr Area:	SCHOL
Federal ID:	F	PARS Scan:	N	Acc Required:	N	Aggr Max:	99,999
Affinity Group:	_	Rounding:	_	Gen Accept:	N	AutCan:	_____
Min Award:	1	Equity:	_	Grd Rpt Rqst:	N	Distribution:	_____
Max Award:	1,000	Ln Offset:	A	Pr on Awd Ltr:	X	Award Message:	_____
		Title IV:	N	Athl Particip:	N		

***** PARS FUND RESTRICTIONS *****

_____	-	-	-	_____	-	-	-	_____	-
_____	-	-	-	_____	-	-	-	_____	-
_____	-	-	-	_____	-	-	-	_____	-

***** DONOR INFORMATION *****

Name: _____ Street: _____
Org: 267110 Citu: _____



Value based security (con't)

- Map operator ID to FAM Fund access.
- “Authorized Terminals” adapted in security segment.

004 Add/Change an Operator

Screen: ___ System: 001 Operator: 1234 Distribution ID: 999999999

Operator Name: OPERATOR, CAPABLE J

Phone: 744-4709

Password: PASSWORD

Password Expiration Days: ___ Date Last Changed: 04-13-01

Authorized Terminals: CEAT ETECH DJ (Optional)

Use Screen Access of Oper: 0172 (Optional)

Use Element Access of Oper: 0172 (Optional)

Element Inquiry/Update Codes: __ (Used if no Element Access List specified)

SIS Value Based Security Info

Home School: ___ Dept: ACAD Primary Area: EN

ORG Security Class: A ('A', 'B', or 'U'nrestricted)

Authorized Academic Unit: _

Authorized Colleges: ___ ___ ___ ___ ___

Authorized Departments: _____

Authorized Majors: _____



Disbursement Processing Flow



Step 1: Validate Eligibility

- Table driven program confirms student eligibility for scholarships and tuition waivers:
 - BR Feed Flag is set
 - Ineligible students: BR Feed flag set to "N."
 - Eligible students: BR Feed flag set to "Y."
 - If BR Feed flag = "F," no update performed.



Step 1: Validate Eligibility (con't)

- User-defined “Eligibility and Attribute” table provides parameters for each award:
 - Minimum fall, spring and summer hours required for disbursement.
 - Undergraduates
 - Graduates



Step 1: Validate Eligibility (con't)

- Degree Program Requirement:
 - A = All degrees are eligible
 - B = Both undergraduate and graduate degrees
 - G = Graduate students only
 - S = Special students only
 - U = Undergraduate students only
 - V = Veterinary Medicine students only



Step 1: Validate Eligibility (con't)

- HRS check required (employment):
 - N = HRS check not performed
 - Y = HRS check performed

- Award Type:
 - **M** = Maximum tuition waiver
 - **V** = Variable tuition waiver
 - **F** = Faculty/ Staff tuition waiver
 - **G** = Graduate teaching / research assistant wavier
 - **O** = Oklahoma Higher Learning Access Program (OHLAP)
 - **R** = Third-party tuition award (Voc-Rehab, ROTC)
 - **S** = Scholarship (non-tuition waiver)



Step 1: Validate Eligibility (con't)

- Priority:
 - Valid number from 00 to 99
 - 00 is reserved for OHLAP and Scholarships

```

BROWSE      SISDF.USER.OSU.UBA591 ELIGTBL      Line 00000012 Col 001 080
Command ==>                               Scroll ==> CSR
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----+-----8
82252,012,006,    ,    ,U, ,S,00,    ,    ,    ,817AA ,OPGNTOPPORTUNI  GRA
82253,012,006,    ,    ,U, ,S,00,    ,    ,    ,818AA ,OPGNTOPPORTUNI  GRA
82254,012,006,    ,    ,U, ,S,00,    ,    ,    ,819AA ,OPGNTOPPORTUNI  GRA
87807,015,015,015,015,V, ,S,00,    ,    ,    ,837FO ,VMSTGVM PROFSTUD
81130,006,003,    ,    ,U, ,V,10,    ,    ,    ,183AC ,NATGRNATIONAL G ARD
82602,006,006,006,004,A, ,R,10,    ,    ,    ,6102 ,ROTC ROTC SCH A R FO
82603,006,006,006,004,A, ,R,10,    ,    ,    ,6103 ,ROTC ROTC SCH A MY
82702,001,001,001,001,A, ,R,10,    ,    ,    ,0702 ,VOCRBVOC REHAB  AX A
82709,001,001,001,001,A, ,R,10,    ,    ,    ,0709 ,VOCRBVOC REHAB  AX A
82710,001,001,001,001,A, ,R,10,    ,    ,    ,0710 ,VOCRBVOC REHAB  AX A
85070,015,015,015,015,V, ,M,10,    ,    ,    ,870AA ,HPSDSHEALTH PRO  SCH
85613,001,001,001,001,A, ,M,10,    ,    ,    ,698AG ,GRDTWGRAD TEACH INCE
85700,012,006,    ,    ,U, ,V,10,    ,    ,    ,160AI ,ABDTWSTUDY ABRO D TU
85701,012,006,    ,    ,U, ,V,10,    ,    ,    ,260AI ,ABDTWSTUDY ABRO D TU
85950,012,006,    ,    ,U, ,V,10,    ,    ,    ,199AS ,HS-FLNAT'L STD  XCHG
85951,012,006,    ,    ,U, ,V,10,    ,    ,    ,299AS ,NSESTNAT'L STD EXCHG
87808,015,015,015,015,V, ,M,10,    ,    ,    ,838FO ,VMIS VM INSTATE TUIT
87809,015,015,015,015,V, ,M,12,    ,    ,    ,839FO ,VMOS VM OUTOFSTATE T
87810,015,015,015,015,V, ,M,13,    ,    ,    ,840FO ,VMSTGVM STUDY GRANT
87811,015,015,015,015,V, ,M,14,    ,    ,    ,841FO ,VMNJCVN-NEW JERSEY C
87812,015,015,015,015,V, ,M,14,    ,    ,    ,842FO ,VMARKVET MED ARKANSA

```

Pre-Disbursement



Step 2: Calculate Payment

Table driven program calculates and adjusts Tuition Waiver Offer and Accept amounts.

- User-defined “*Fund to Charge*” table links FAM fund code to BR subcode.
 - Percentage of charge used in calculation.



Step 2: Calculate Payment (con't)

- Generates standard maintenance transaction to update Offers and Accepts:
 - If “**M**aximum Tuition Waiver,” only Accept amount will be lowered, if necessary.
 - If “**V**ariable Tuition Waiver,” Offer and Accept may be adjusted.
- Sets BR feed flags for ineligible students
 - Example: Award conflicts – identical priorities

```
BROWSE      SISDF.USER.OSU.UBA593.FUND2CHG      Line 00003570 Col 001 080
Command ==>      Scroll ==> CSR
81530,10450,100
81530,10460,100
81530,10470,100
81530,10480,100
81530,10490,100
81531,10410,100
81531,10420,100
81531,10430,100
81531,10440,100
81531,10450,100
81531,10460,100
81531,10470,100
81531,10480,100
81531,10490,100
81901,10110,050
81901,10112,050
81901,10113,050
81901,10114,050
81901,10115,050
81901,10116,050
81901,10117,050
81901,10118,050
```

Pre-Disbursement



Step 3: Disbursement Compliance

Items Verified:

- Current credit hours carried are greater than zero.
- Anticipated hours are greater than zero.
- Financial Aid Class level equals Registrar's class level.
- Student not over awarded or over budget.



Step 3: Disbursement Compliance (con't)

Items Verified:

- All document requests are complete or waived.
 - Certain documents are not considered
 - SC*** - scholarship apps
 - PM*** - promissory notes / loan processing items
- If student is classified as a *'special student'*, the Budget Code must be "TC" (teacher certification) or "PC" (prerequisite courses).



Pre-Disbursement

Step 3: Disbursement Compliance (con't)

Items Verified:

- Confirmation of undergraduate status for Pell and SEOG.
- FA Residency status in sync with Registrar's.
- Current semester RAP status
- FA budget confirmation: Anticipated hours agree on disbursement and budget segments



Pre-Disbursement

Step 3: Disbursement Compliance (con't)

Items Verified:

- If Stafford awarded, entrance interview completed.
- Annual and aggregate program limits for:
 - Perkins
 - SEOG
 - Direct Loans



Disbursement

Step 4: System Modifications (SBA590)

- Modified to bypass any award with BR Flag equal to "F" (student/award specific).
- Modified to allow exclusion or inclusion of specific funds as needed.



Step 5: Award Synchronization

- Used to synchronize Offer and Accept amounts to Paid amount for each term.
 - Processes funds identified in “Eligibility and Attribute” table.
- Executed only after end of add/drop for each term.



Requested

Disbursement enhancements

- New 'clone' screen allowing users to view all scholarships of any given student
- New 'clone' screen allowing user to access and update fund screens



OSU initiatives

PC Lab



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Master

Promissory

Notes



Master Promissory Notes

- 100% Electronic MPNs for 2001-02
- PC lab essential
- When student accepts Stafford loan:
 - Student notified if *MPN* needed
 - Student notified if *Entrance Interview* needed
 - Custom Letter
 - System generated follow-up letter (2)



OSU initiatives

Master Promissory Notes

- Nightly program:
 - Generated mail merge file
 - Requests MPN
 - Requests entrance interview
 - Requests both if necessary
 - Letters completed by Loans staff



Master Promissory Notes

- Nightly program (continued):
 - Posts document request to FAM tracking segment
 - Documents codes compliant with masking scheme
 - Posts document complete status to FAM when
 - MPN acknowledged by LOC
 - Entrance interview completed



OSU initiatives

E-mail



E-mail

- Objective: Enable OSFA staff to more efficiently communicate with students via e-mail
- Policy decision needed: Commitment to business e-mail address for university correspondence



E-mail

- Project requirements:
 - Individual basis
 - Custom correspondence
 - Standard text – easily updateable
 - Bulk mailings to targeted groups
 - Loan consolidation campaign



OSU initiatives

E-mail

- Project requirements (continued)
 - Generic return address
 - finaid@okstate.edu
 - Personal return address



E-mail

1 - PROD

File Edit T Fonts Options Macro View Window Help

W 70137 - SECURITY - YOU MAY NOT UPDATE ON THIS SCREEN

110 Academic Program Maintenance KENNEDY, PATRICK B

Screen: SID: Course: Term:

Oklahoma State Uni

MATRICULATION HISTORY MATRICULATION RECORD

Seq	Acad	Program	Cls	Car	Ent	Exit	Col:	GU	General University
1	GU	NDGD NODG	GM	M	876	996	Deg:	NDGD	Nondegree program, graduate I
2							Maj:	NODG	Non-degree Seeking

Class: GM Class Rule: GM Residency: R
 Career: M Grade Rule: G S Level: G
 Prev Schl:

Term/Date Action/Reason
 Entry: 876 Y
 Exit: 996 EP End of Program

Final:

Exp Rtn Leave:
 Exp Grad Term: Degree Catalog: 876
 Deg Ckout Term: Deg Ckout Status:
 Degree Awarded:

Delete:

4a 1 Sess-1 139.78.100.9 TCP00278 4/10



E-mail

The screenshot shows a terminal window titled '1 - PROD' with a menu bar (File, Edit, Transfer, Fonts, Options, Macro, View, Window, Help) and a toolbar. The main display area shows a security warning: 'W-Z0137 - SECURITY - YOU MAY NOT UPDATE ON THIS SCREEN'. Below this is the text '110 Academic Program Maintenance' and 'KENNEDY, PATRICK B'. A form for 'Screen:', 'SID:', 'Course:', and 'Term:' is visible. The 'MATRICULATION HISTORY' table is shown below, with columns for 'Seq', 'Acad Program', 'Cls', 'Car', 'Ent', 'Exit', 'Col', and 'Deg'. The table contains two rows of data. A 'Student Email' dialog box is overlaid on the terminal, containing a text field for 'Enter SSN or leave blank to use current SSN', radio buttons for 'Personal Email' (selected) and 'Business Email', buttons for 'Custom Letter', 'Form Letter', 'Edit Document', and 'Cancel', a 'To:' field with 'loatk@okstate.edu', a 'Subject:' field with 'Email Sample', and a 'Save' button. Two blue arrows point to the 'To:' and 'Subject:' fields. At the bottom of the terminal window, a status bar shows '1 Sess-1', '139.78.100.9', 'TCP00278', and '4/10'.

W-Z0137 - SECURITY - YOU MAY NOT UPDATE ON THIS SCREEN
110 Academic Program Maintenance KENNEDY, PATRICK B

Screen: SID: Course: Term:

Oklahoma State Uni
MATRICULATION RECORD

Seq	Acad Program	Cls	Car	Ent	Exit	Col	Deg
1	GU NDGD NODG	GM	M	876	996	GU General University	NDGD Nondegree program, graduate I
2							egree Seeking

Rule: GM Residency: R
Rule: G S Level: G

on/Reason
nd of Program

Exp Rtn Leave:
Exp Grad Term: Degree Catalog: 876
Deg Ckout Term: Deg Ckout Status:
Degree Awarded:
Delete:

1 Sess-1 139.78.100.9 TCP00278 4/10



E-mail

1 - PROD

File Edit Transfer Fonts Options Macro View Window Help

010 Student Electronic Access KENNEDY, PATRICK B

Screen: SID:

Personal Email Address:
PATK@OKSTATE.EDU

Business Email Address:

Web Information

No. of attempts:

Last attempt:

Access number: 0000000

FADDLe Vr 2.022s

Subject

Email Sample

Type Message here

Type your message here

Email address being sent to

PATK@OKSTATE.EDU

Send Cancel

Date Last Maint: 09-10-01

4 1 Sess-1 139.78.100.9 TCP00278 4/10



E-mail

The screenshot shows a terminal window titled "1 - PROD" with a menu bar (File, Edit, Transfer, Fonts, Options, Macro, View, Window, Help) and a toolbar. The main interface is for "010 Student Electronic Access" and is associated with "KENNEDY, PATRICK B".

Fields on the left include:

- Screen: SID:
- Personal Email Address: **PATK@OKSTATE.EDU**
- Business Email Address:
- Web Information
- No. of attempts:
- Last attempt:
- Access number: 0000000

A "FADDLe Vr 2.022s" window is open, showing an email composition screen with a "Subject" field containing "Email Sample" and a "Type Message here" area. A "Finished" dialog box is displayed in the foreground, stating "Finished sending your mail" with an "OK" button. Below the message area, the "Email address being sent to" is "PATK@OKSTATE.EDU".

At the bottom right of the terminal, it says "Date Last Maint: 09-10-01". The status bar at the bottom shows "1 Sess-1 139.78.100.9 TCP00278 4/10".



E-mail

The screenshot shows a terminal window titled '1 - PROD' with a menu bar (File, Edit, Transfer, Fonts, Options, Macro, View, Window, Help) and a toolbar. The main display area shows a terminal session with the following text:

```

W-Z0137 - SECURITY - YOU MAY NOT UPDATE ON THIS SCREEN
110 Academic Program Maintenance          KENNEDY, PATRICK B

Screen: 1  SID: ██████████ Course: _____ Term: _____
                                           Oklahoma State Uni
MATRICULATION HISTORY                    MATRICULATION RECORD
Seq Acad Program Cls Car Ent Exit          Col: GU  General University
1  GU  NDGD NODG  GM  M  876 996          Deg: NDGD Nondegree program, graduate I
2                                           Maj: NDGD Non-degree Seeking
                                           Rule: GM  Residency: R
                                           Rule: G   S   Level: G
                                           on/Reason
                                           nd of Program

Exp Rtn Leave:
Exp Grad Term:          Degree Catalog: 876
Deg Ckout Term:        Deg Ckout Status:
Degree Awarded:
Delete:
  
```

Overlaid on this is a 'Student Email' dialog box with the following fields and controls:

- Text input: Enter SSN or leave blank to use current SSN
- Radio buttons: Personal Email, Business Email
- Buttons: Custom Letter, Form Letter, Edit Document, Cancel
- Reply field: [██████████@okstate.edu]
- Subject field: [Email Sample]
- Button: Save

Two blue arrows point to the 'Form Letter' and 'Edit Document' buttons. At the bottom of the terminal window, a status bar shows: 4A | 1 Sess-1 | 139.78.100.9 | TCP00278 | 4/10



OSU initiatives

Scholarship Application Processing

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Scholarship Application Processing

- Objectives / Requirements:
 - Track and route all scholarship applications within 24 hours of receipt
 - 6,000 applications per year – High School and Transfer Students
 - February 1 deadline
 - Notify students of receipt
 - Enhance internal control
 - Communicate processing to Recruitment Office



Scholarship Application Processing

- Applications processed by consolidated data entry unit:
 - Application tracked into FAM
 - Application copied as needed
 - Application routed
 - Routing annotated on FAM



Scholarship Application Processing

Nightly program created to:

- Generate batch file of E-mail addresses
 - Confirmation letters sent daily
- Generates and posts updates to the 'recruitment' segment of SIS data base
- Generates 'manifest' of applications that will be transferred to 'recruitment' office.



Pursuit

**“There is a better way to do it –
Find it”**

Thomas Alva Edison

THE U.S. Department of
EDUCATION

Questions?



Electronic Access Conference
emagine
2001

Pat Kennedy

patk@okstate.edu

Student Financial Assistance

THE U.S. Department of
EDUCATION



INFORMATION WEEK / March 9, 1992

10 Commandments of IT

- Remember, this is business
- Talk to the users
- Understand your **customer's** business
- Training is not a discretionary cost
- Use the vendor's knowledge



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10 Commandments of IT

- Develop an IT staff with business and technical skills
- Management issues are always more important than technical issues
- Every contact with users is a PR opportunity
- Spend time on strategy
- Have a good time