Session 8 - Student: Financial Aid- General

Date: Wednesday, March 30, 2022
Time: 8:00am – 10:30am
Ellucian

SANTA ROSA JUNIOR COLLEGE

Evaluator's Name:_____

	Functionality	Comments
1.	Provide a 15-minute overview of the financial aid application process.	
2.	Demonstrate the automated loading of ISIR data and where ISIRs are housed	
3.	Demonstrate the ability to store and access complete ISIR records for multiple years	
4.	Demonstrate the ability to set default parameters for ISIR records and then override them for specific students	
5.	Demonstrate the ability to set flags on students' records for follow up action, e.g., verification, c-codes, dependency issues	
6.	Demonstrate the ability to establish Cost of Attendance budgets for different student types and programs	
7.	Demonstrate the creation of rules that define the various application materials that must be submitted by students and how/where documents are tracked	
8.	Demonstrate the interface to link online form submissions to the ERP	
9.	Demonstrate the techniques that are used to track the completeness of financial aid applications.	
10.	Demonstrate how students can check the status of their financial aid application and see whether there are any outstanding issues.	
11.	Show how students can enter information and upload documents to complete their financial aid application	
12.	Show how students enter direct deposit information to receive refunds and paychecks	
13.	Demonstrate the generation of communications, e.g., texts, letters, email messages, to notify students of	

	Functionality	Comments
	important matters, e.g., missing information, award offers.	
14.	Show how all communications are logged	
15.	Demonstrate the use of rules to help determine satisfactory academic progress.	
16.	Demonstrate the ability to add comments into a student's record and to share comments with different offices	
17.	Demonstrate the use of an audit trail that logs all transactions that are relevant to the processing of a student's financial aid application.	
18.	Demonstrate the use of imaging technology that enables the capture of hardcopy information, e.g., tax returns.	
19.	Demonstrate the ability to use estimation tools to determine budgets, needs, and packages.	
20.	Demonstrate the creation of a package that involves a variety of aid (e.g., loans, grants, work study) and ability to auto-package based on rules	
21.	Demonstrate the use of different rules and algorithms for creating packages for different cohorts.	
22.	Demonstrate the actual offer of a financial aid award.	
23.	Demonstrate the ability to update data items and repackage an award, e.g., non-resident to resident	
24.	Demonstrate the ability to make changes to awards that have already been made to students (in the event, for example, that the federal & state government has more/less funding than was anticipated).	
25.	Demonstrate the ability to place holds on a student's record and track them over time.	
26.	Show how SAP is calculated automatically	

SANTA ROSA
JUNIOR COLLEGE

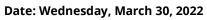|	Functionality	Comments
27.	Demonstrate the ability to place SAP holds and to communicate holds/release of holds to relevant departments.	
28.	Demonstrate the ability to flag a student for non-renewal of aid.	
29.	Demonstrate the ability to manage a student's appeal of their financial aid award for SAP and Unusual Enrollment.	
30.	Demonstrate the ability to manage a student's acceptance or modification of their financial aid award.	
31.	Demonstrate the disbursement of a financial aid award, including origination, authorization and disbursement for grants, scholarships, and loans	
32.	Show how rules and real-time validations are used during the disbursement process – e.g., units enrolled, SAP, etc.	
33.	Demonstrate the ability to disburse an award by percentages or dollar amounts over multiple POE or terms.	
34.	Demonstrate the ability to monitor Over Award, Over Tuition, and under full-time status, and other quality control rules.	
35.	Demonstrate the ability, with appropriate authority, to override specific awards. Demonstrate the availability of an audit trail for such overrides.	
36.	Demonstrate the ability to calculate and award Lifetime Eligibility Used (LEU) students based on remaining eligibility.	
37.	Demonstrate the ability to redistribute awards for LEU students within the award year based on actual usage.	
38.	Demonstrate the ability to interface with other systems (Federal, State) using APIs, such as EdConnect, COD, NSLDS.	

	Functionality	**Comments**
39.	Demonstrate the ability to run one process by multiple users simultaneously, like originations and disbursements.	
40.	Demonstrate the ability to integrate with third party services, e.g., ELM	
41.	Demonstrate the ability to display disbursement information at the student level.	
42.	Demonstrate the ability to provide a calculator on a student interface to determine award amount based on unit load.	
43.	Demonstrate ability to automatically verify enrollment to process aid at point of census	
44.	Demonstrate ability to schedule different processes, reports, and tasks to run on a regular basis and be available in real time	
45.	Demonstrate ability to develop queries and reports	
46.	Demonstrate ability to import external awards into the system	
47.	Demonstrate role-based access	
48.	Demonstrate ability to work in multiple years, and to migrate students forward in future years.	
49.	Demonstrate ability to work with clock hour programs, from setting up term, ISIR load, using Pell 4 formulas	
50.	Show how the software handles Summer Pell or 150% Pell in a year scenario.	

SANTA ROSA
JUNIOR COLLEGE

Evaluation Form
Perceived Strengths of Vendor Solution:
Perceived Weaknesses of Vendor Solution:
Additional Comments:
Acceptability of Vendor Solution: ___ Yes ___ No