

Rutgers Student Financial Planning - Innovative Approaches in a Complex Implementation

Session #7764

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The Rutgers OSFP implementation has presented several opportunities to innovate in redesigning Financial Aid business processes across our four campuses and two distinct student information systems. During this presentation, we will explore these innovative approaches in leveraging Oracle SaaS and PaaS solutions and how we work in collaboration with Oracle and our implementation partner, Sierra-Cedar, to successfully move our project forward.



- Introductions
- Overview of Rutgers University
- Current State to Vision for the Future
- Financial Aid Business Process Changes
- Integrating with Multiple Legacy Student Information Systems
- OSFP Overview
- Utilization of Oracle Integration Cloud (OIC)
- Wrap-Up
- Q&A



Andrew Gootman

Project Manager



Jean McDonald-Rash

Associate VP,
University
Enrollment Services



Rob Fahy

Executive Director,
University
Enrollment Services



Bert Torres

Associate Director,
Office of Information
Technology



Saire Errico

Sierra-Cedar, Inc.
Functional Lead



Chris Grant

Sierra-Cedar, Inc.
Technical Lead

About Rutgers University – By the Numbers

- Founded in 1766 - The eighth oldest institution of higher learning in the United States
- 29 schools and colleges and 4 distinct chancellor units
- 71,000+ students from all 50 states and more than 125 countries
- 51,200 undergraduates and 19,800 graduate students
 - 50,200 students at Rutgers University–New Brunswick, including Rutgers Biomedical and Health Sciences (RBHS)
 - 13,600 students at Rutgers University–Newark
 - 7,200 students at Rutgers University–Camden
- 8,700+ full- and part-time faculty and 14,900+ full- and part-time staff
- Home to more than 1,200 international scholars from more than 80 countries
- 300 research centers and institutes
- 26 libraries
- 800+ student clubs and organizations
- Among the most ethnically diverse campuses in the nation and Big Ten
- 530,000+ alumni

Drivers in the Decision to Move to the Cloud

Functional Current State – Financial Aid

- Many time-consuming manual processes in use which can reduce both amount of time able to be spent on quality interactions with students and create compliance risk.
- Too many handoffs between departments which lengthens turnaround times to resolve inquiries.
- With current systems and processes, we must spend an inordinate amount of effort to meet compliance regulations.
 - All federal and state mandated changes must be evaluated internally, converted to technical specifications, implemented and tested in house
- Among current pain point areas we will alleviate with the Oracle Student Financial Planning are:
 - Packaging
 - Loan Processing
 - R2T4
- Opportunity to review all current business processes that have evolved overtime to work within current technical limitations
 - COA
 - SAP
 - Verification

Drivers in the Decision to Move to the Cloud

Technical Current State

- The University currently has two (2) student information systems:
 - An aging, homegrown mainframe system and web applications with many complex integrations
 - Ellucian Banner, which was in use by UMDNJ when they merged with Rutgers
- Other student services components have been acquired and developed locally in central and distributed departments, and additional integration points with our two (2) student systems.
- Many customizations in support of the professional schools' requirements.
- Central units, chancellor units and schools have had the ability to request customize business processes and implement those requirements in the systems to meet their specific needs.
- Our system has served Rutgers but has reached a level of complexity that is creating roadblocks to effectiveness and multiple points of failure.



Vision for the Future - Student Financial Planning

- Robust and aligned enterprise-wide student financial planning processes and systems in use throughout the University.
- Help students understand their complete financial aid picture, and actively drive student action and engagement.
- Deliver comprehensive, high quality student financial planning-related data.
- Reduce risk and increase compliance to external and internal requirements.
- Significantly reduce or eliminate non-value-added tasks (i.e., manually cleansing, validating, and reconciling data across multiple sources).
- Minimize/eliminate the need for shadow departmental systems and/or duplication of data.

Vision for the Future - Student Management Cloud

- Implementing Oracle Student Financial Planning is our first step to the Oracle Student Cloud.
- The SIS replacement will result in a “21st Century” experience for students, faculty, and staff by being intuitive and accessible by modern end-user devices (e.g., mobile, tablet, PC, etc.).
- The selection of Oracle Student Cloud should lead to more seamless transactions and reporting between Oracle Cloud Financials, our financial management system, and the Oracle Human Capital Management Cloud system, which we are implementing soon.
- A new, integrated SIS that gives staff a more complete view of students’ data and reduces manual processes to a minimum.
- Provide a single source of integrated, validated, and timely data and improve the user experience for all Rutgers students, faculty, and staff.
- This is a pivotal move toward creating a single identity and culture, standardizing practices, and improving collaboration across Rutgers University–New Brunswick, Rutgers University–Newark, Rutgers University Camden, Rutgers Biomedical and Health Sciences, and Central Units.

Transforming the Organization

Business Process Review

- SFP is a highly automated system designed to operate in compliance with federal regulations. To support compliance, Oracle delivers system features and configuration for federal application processing and TIV aid awarding.
- Interactive Design and Prototype sessions are structured to lead implementation team staff through the financial aid lifecycle in the SFP product, with a goal of cultivating a high level of familiarity with delivered SFP configuration and processes.
- Throughout the IDP process, institutional subject matter experts determine opportunities for short-and long-term improvement, identify areas where custom configuration may be needed, and assess gaps.
- The business process review provides an opportunity for the alignment of business processes across institutional units, identifying best practices from different. All decisions are made with an eye towards future institutional goals, including future SIS landscape.

Transforming the Organization

Critical Decisions & Business Process Wins

- Oracle Student Financial Planning provides automatic integration with TD Client, which will streamline the transmission of files to and from the Department of Education's CPS and COD systems
- OSFP supports enhanced 'no-touch' verification processing. Students can upload documents through the Portal and data enter relevant values. OSFP compares values with data on the ISIR and, if possible, automatically creates correction. Targeted quality assurance processes will support compliance while reducing manual effort.
- Adoption of Net ID as external student ID
 - At go-live, two legacy SISs will integrate with SFP
 - Each uses a different unique student identifier
 - Project leadership guided a decision process leading to the adoption of a Single ID/External Student ID that will persist throughout the student lifecycle. This decision was made with an eye not just to go live, but to future state with an integrated Student Information System.



Supporting the Transformation

Integrating with Two Separate Legacy Systems in Both Directions

- OSFP is the source of record for only Financial Aid data
- OSFP relies on student, academic and financial data from other systems
- Integrations are critical

Legacy System

- Homegrown mainframe system
- Supporting Financial Aid, Admissions, Student Records, and Billing
- Supports most Undergraduate and Graduate populations
- Becoming more difficult to support and maintain due to complexity and developer familiarity



Supporting the Transformation (continued)

Banner

- Student system for Biomedical and Health Science schools
- A modern solution to support this student population
- On premise package application
 - Requires additional University infrastructure resources
 - Reliant on a consultant group to support and maintain our Banner instance

Students in both Systems Simultaneously

- Joint programs, impacts to enrollment reporting and billing process
- Cross registration



OSFP Overview

Implementing OSFP

- Oracle delivers Student Financial Planning Cloud 85% Ready To Use
 - Required Institution Specific Configuration
 - School code and OPEID Values
 - Cost of Attendance
 - State and Institutional Funds
- Configuring OSFP to meet institution requirements
 - ISIR Verification
 - State or Institution specific documents
 - Eligibility and awarding for State and Institutional Funds

OSFP Integrations using Oracle Integration Cloud

Critical OSFP Integrations

- Oracle delivers 70+ APIs with Student Financial Planning
- 30+ integrations will be needed for the Rutgers implementation
 - Includes Inbound, Outbound, and Request/Reply APIs
- 5 inbound to OSFP required to provide the core data for the application to function
 - Double that with two legacy systems
- Many delivered integrations outbound from OSFP
 - Provides Financial Aid data back to legacy SIS applications
 - Leveraging to populate data warehouse tables to support reporting requirements
- Continued support for existing internal integrations



Why Oracle Integration Cloud

- Many out-of-the-box adapters
- Low code and reuse allowing for rapid development
- Abstraction to reduce complexity and improve ease of use
- Using OIC will pave path to Oracle Student Management Cloud (OSMC)
 - As we develop the current integrations, we keep an eye toward the future
 - Remaining plugged-in to the on-going OSMC development

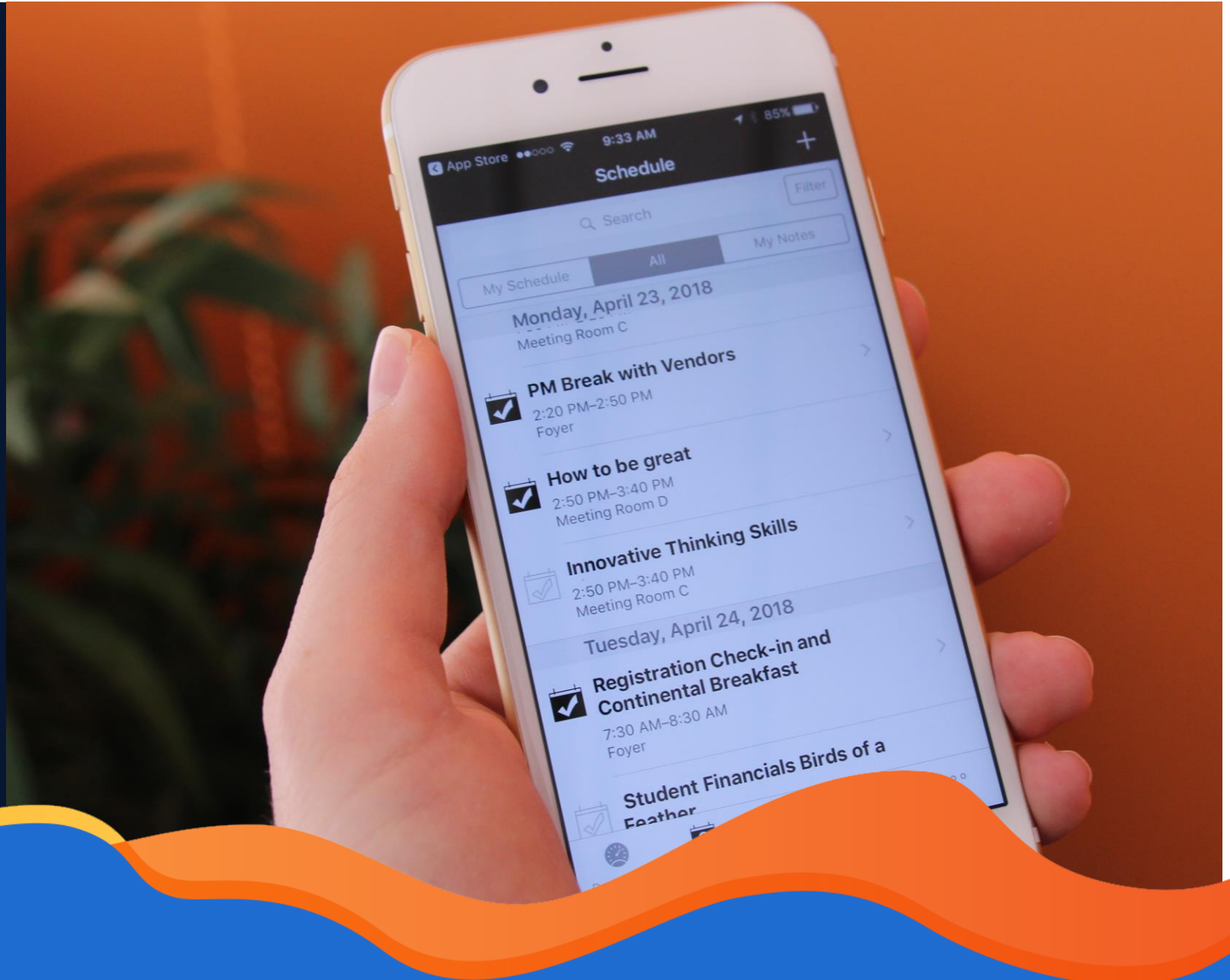


Wrap-up

- Combined flexibility of SaaS and PaaS products
- Open to Change has been the key to our success
- Collaboration between Rutgers, Sierra-Cedar, and Oracle
- We feel we have a powerful implementation story
 - Oracle Student Financial Planning at a non-Campus Solutions institution
 - A model for other Banner schools to follow

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QUESTIONS?

andrew.gootman@rutgers.edu

jean.rash@ues.rutgers.edu

htorres@rutgers.edu

Saire.Errico@sierra-cedar.com

Chris.Grant@sierra-cedar.com

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