Executive Summary

Request 21– Bursar Balance and Minimum Payment

Updated 2/28/2017

Financial education and awareness has been identified as a critical component of student retention. University leadership has requested that we present financial information through multiple applications on campus to increase visibility of these costs for students and their parents.

Request 21 will provide for delivery of bursar balance and minimum payment to campus applications via an API for personalization purposes. The first apps to consume this API will be OU Innovate and ONE.ou.edu.

User Stories

- o As a student, I want to view financial information so I can make better choices about managing the cost of my education.
- o As a student, I want to know if my financial standing with the University will prevent me from enrolling in the next semester, so that I can resolve any issues and enroll on time.
- o As the Bursar Office, Financial Aid Office, Graduation Office, or other office involved in supporting student financial needs, I would like easy access to deploy financial information within existing and new applications.
- o As a student support staff (Advisor, faculty, graduation coach, etc.), I want to discuss student financial preparation as it relates to enrolling and graduation and would like to know that students have easy access to this information.

Sample Application

Bursar balance and minimum payment would be presented to a student through an existing or new application as a data point, typically partnered with a link to pay the outstanding minimum payment per the example below:

1. Admitted student logs into OU Innovate.
2. OU Innovate details the student's upcoming minimum payment, along with a button labeled "Pay Now."
3. Student clicks the button and is taken to TouchNet.
4. Student pays minimum payment via TouchNet.
5. Minimum payment is updated in application to $0.00.

Delivery and Timeline

- o **Delivery Method:** This data will be delivered through a REST API. Applications will provide OUNetID as an input and receive the data points listed here as an output.
- o **Timeline:** To meet initial timelines for OU Innovate and ONE, we need to complete the API by October 15. It will take approximately one week after DGCC approval to complete this work.
- o **Project Execution:** This project will be executed by OU IT's Project Management Office.
    - o **Project Acceptance:** This project will be complete when a REST API with the requested data is made available for consumption. Any application development utilizing that API will fall outside of the project scope.

Data Validation Checklist

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Category 1: Bursar

- o Method: Phone Calls
- o Time stamp: 9/23/2016
- o Attendees/participants:
  - o 9/1/2016: Kathleen Schmidt (data owner at time of request)
  - o 9/23/2016: Terry Martin (IT advisor), Brad Cook and Jennifer Cook (both data stewards at time of request)
- o Data Spec presented: v1.0
- o Session Notes: Caveats documented in Supplementary Materials
- o Validation Decision:
  - o 9/1/2016: Kathleen validated data as appropriate for the use cases defined in executive summary
  - o 9/23/2017: Package was validated for use cases defined in executive summary
- o Category Specific Items:
  - o FERPA Compliance: Documented in Process Notes

Process Notes
Request 21– Bursar Balance and Minimum Payment
Updated 9/26/2016

Validation Planning

- o Consulted Kathleen Schmidt, Jennifer Cook, and Brad Cook.
- o Data is appropriate for use cases per Kathleen (9/1/2016)
- o Should we include only current minimum payment? No. Include both current and historical minimum payment so students can compare previous minimum payments due against account credits.
- o Add to validation checklist:
  - o Before validation can be approved, requestor must present a plan for handling FERPA concerns.

Validation Notes
Attendees: Nick Key, Terry Martin, Jennifer, and Brad Cook
Date: 9/26/2016

- o Caveats: Minimum payment refreshes only on the 21st of each month. Even if a payment is made before the 21st, the minimum payment will not change or update. Because of this, some minimum payments can be larger than the total bursar balance.
- o FERPA plan was approved because only the student will be able to view the data.

Caveats and Data Quality
Date: 9/26/2016

- o Caveats: Minimum payment refreshes only on the 21st of each month. Even if a payment is made before the 21st, the minimum payment will not change or update. Because of this, some minimum payments can be larger than the total bursar balance.

Data Specification

Request 21 - Bursar Balance and Minimum Payment

v1.0 - Updated: 2/13/2017

Category	Attribute Name	Source (SOR)	Schema	Location	Read/Write	Description	Notes	Validated By
Bursar	OUSTACCOUNT.AR_MIN_PMT_PIDM	Banner	OUSTACCOUNT	AR _MIN_PMT	Read	Unique student identifier (PIDM) to connect tables	To relate a historical term min payment to a student	
Bursar	OUSTACCOUNT.AR_MIN_PMT	Banner	OUSTACCOUNT	AR _MIN_PMT	Read	Minimum payment due by term		
Bursar	OUSTACCOUNT.AR_MIN_PMT_TERM_CODE	Banner	OUSTACCOUNT	AR _MIN_PMT	Read	Term for selecting minimum payment to display		Brad Cook and Jennifer Cook
Bursar	OUSTACCOUNT.AR_CURR_MP_ID	Banner	OUSTACCOUNT	AR_CURR_MIN_PMT	Read	Sooner ID for connecting tables	To relate a current min payment to a student	
Bursar	OUSTACCOUNT.AR_CUR_MIN_PMT	Banner	OUSTACCOUNT	AR_CURR_MIN_PMT	Read	Minimum payment due for current period		
Bursar	TBRACCD_BALANCE_PIDM	Banner	TAISMGR	TBRACCD	Read	Unique student identifier (PIDM) to connect tables	To relate a balance to a student	
Bursar	TBRACCD_BALANCE	Banner	TAISMGR	TBRACCD	Read	Total balance owed to the University		