

# Executive Summary

Request 3.2 – OU Bound Financial Success Plan

Updated 2/16/2017

All incoming direct from high school students are now required to submit (and have approved) their financial success plan during their onboarding process (there is no longer the option of the \$1000 payment OR the financial plan, it is required for each student).

As a part of the OUBound initiative, this request is for the creation of a daily feed to personalize an automated app to help students create their student success plan.

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## User Stories

- As an incoming student, I want to know how to complete my financial plan.
- As an incoming student (and/or the parent/guardian of an incoming student), I want a real-word idea of the cost of college with a genius/wizard to walk me through how I can pay for it.

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## Sample Application

This project involves a collaboration with Financial Aid, OAR, NextThought and the Graduation office to create an app like the Scholarship Genius to help students and parents put together a financial success plan.

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## Delivery and Timeline

- **Delivery Method:** This data will be delivered nightly through a flat file.
- **Timeline:** NextThought has requested having something to code against in the next two or three weeks.
- **Project Execution:** This project will be executed by the student team as it falls below the 20-hour threshold.
  - **Project Acceptance:** Upon DGCC approval, this will be submitted to the student team for execution.

# Data Validation Checklist

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## Category 1: Bursar

- Method: Email
- Time stamp: 2/16/17
- Attendees/participants: Kathi Robinett; Chris Kennedy; JP Morgan
- Data Spec presented: v1.0
- Session Notes: N/A
- Validation Decision: Approval Granted
- Data Classification: Bursar
- Category Specific Items: N/A

# Data Specification

## Request 3.2 - OU Bound Financial Success Plan

v1.0 - Updated: 2/17/2017

Category	Attribute Name	Source (SOR)	Schema	Location	Read/Write	Description	Notes	Validated By
General	SOONER_ID	ODS	OUCUSTOM	PERSON_OU	Read			Chris Kennedy
Financial Aid	AID_YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			Kathi Robinett
Financial Aid	FUND_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_TITLE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_STATUS_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_STATUS_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_SOURCE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_SOURCE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_ANNUAL_OFFER_AMOUNT	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	AWARD_ANNUAL_OFFER_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	PACKAGE_COMPLETE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	PACKAGE_TRK_REQ_COMPLETED_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_TYPE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_TYPE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_SOURCE_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_SOURCE_DESC	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FUND_DETAIL_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	LAST_UPDATE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	MAX_FAFSA_COMPLETE_DATE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FAFSA_NOT_COMPLETE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			
Financial Aid	FAFSA_NOT_COMPLETE_WHY	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD	Read			