AGENDA

- About Oregon State University (OSU)
- Federal Direct Student Loan Process
  - Structure/Design
  - Schedule
  - Challenges and future improvements
- Alternative/Private Student Loan Process
  - Goals of the project
  - Steps in designing our process
  - Structure/process design
  - Challenges we encountered
  - Future goals
- Open Discussion/Questions

ABOUT OSU

- OSU is just 1 of 3 land, sea, space, and sun grant universities in the U.S.
- As of Fall 2024:
  - Total Student Enrollment – 37,573 (Cascades, Corvallis, Ecampus, INTO, LaGrande, and Portland locations) 84% are Undergraduate and 16% are Graduate students
  - 26,719 Financial Aid Recipients
  - Over $194 million accepted in loans (170M in Federal and 24M in Private) to over 13K borrowers
- Systems:
  - Student Information System – Banner
  - Job Submission System – AWA
  - Secure File Transfer Process – TDclient

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FEDERAL DIRECT LOAN - PROCESS

- Structure and Design
- ROR_TDCLIENT_SEND_DL_2425
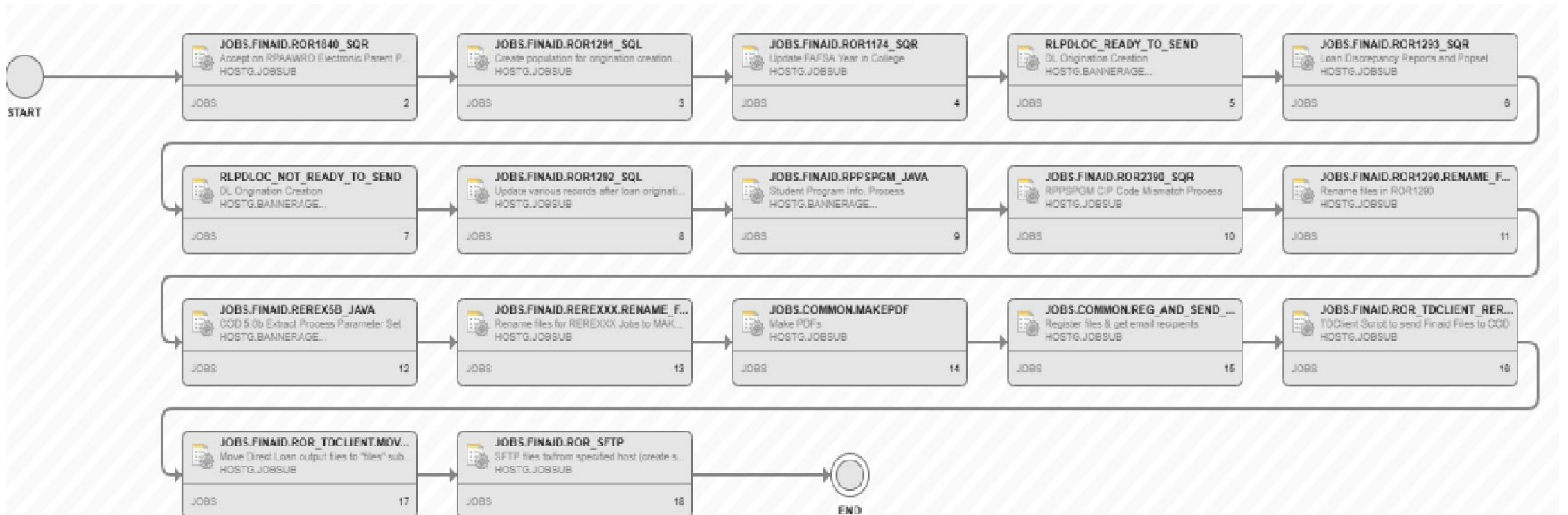
FEDERAL DIRECT LOAN – PROCESS

- ROR_TDCLIENT_RECEIVE_DL_2425

- Scheduling/timeline
- Challenges and Future improvements

ALTERNATIVE /PRIVATE STUDENT LOAN PROCESS

Goals of the project:

1. Reduce manual certifications from 100% to 50%

2. Reduce manual entry errors

3. Reduce processing times from 3-4 weeks to 2-3 business days

4. Improve the student experience and transparency within the school certification process

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ALTERNATIVE /PRIVATE STUDENT LOAN PROCESS

Steps in designing our process:

1. Met with staff to identify their steps, any decision

   points, data they use, and obstacles or roadblock

   they encounter.

2. Group decision points: Data/Human Driven

3. Getting all necessary data into one system

4. Designing around simplicity

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STRUCTURE AND PROCESS DESIGN

Importing lender certification request from ELM into Banner (ROAUSDF)

150	Program Code	
151	Requested Amount	
152	Period Start Date	
153	Period End Date	
154	Guarantor Code	
155	Default Lender ID	
156	Citizen	
157	Other/Borrower	
158	School Certification request date	
159	FUND Code	
160	CL Unique Id	

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STRUCTURE AND PROCESS DESIGN

Creating New Fund Codes specific to a lender

- RFRBASE – Fund Base Data

- RPRLOPT – Loan Options

Default Return ID	760000	•••	ELM RESOURCES INC.
Default Lender ID		•••	
Default Guarantor ID		•••	

- RFRMGMT – Fund Management

Award Status	Loan Rules	Web Processing Rules

▾ LOAN RULES

Direct Loan Indicator	(None)	▼
Electronic Loan Indicator	A=Alternative	▼
Manual Loan Indicator	(None)	▼
Alternative Loan Program Type	L63	

☐ Create Promissory Note Requirements when Accepted

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STRUCTURE AND PROCESS DESIGN

Creating Batch Posting and Algorithmic Rules

- RORPOST – Batch Posting Rules

Application Code *	Selection ID *	User ID *	ISIR Type	ISIR Value	Type Code *	Code to Post	Code to Post Algorithmic Rule	Amount to Post	Amount Algorithmic Rule
FINAID	0000_TEMP_ALTL	SAISPRD			F	ALTL3			ALTL3_AMT
FINAID	0000_TEMP_ALTL	SAISPRD			F	ALTL4			ALTL4_AMT
FINAID	0000_TEMP_ALTL	SAISPRD			F	ALTL5			ALTL5_AMT
FINAID	0000_TEMP_ALTL	SAISPRD			F	ALTL6			ALTL6_AMT
FINAID	0000_TEMP_ALTL	SAISPRD			F	ALTL7			ALTL7_AMT

- RPRALGR – Algorithmic Packaging Rules

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STRUCTURE AND PROCESS DESIGN

- ROR2680 - process to upload the pending certificate CSV file into BANNER and store information in ROAUSDF field 150-160

- RBRPBGP – Period Budget Grouping Process

- ROR2685 – Posting ALTL Awards

- RPRELAP – Electronic Loan Application

- ROR1780 – Batch Post Comments

- RPRELAX – Electronic Lan Extraction

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ALTERNATIVE /PRIVATE STUDENT LOAN PROCESS

Challenges we encountered:

- Loan period/Aid Period Alignment

- # of fund codes base-line processes can handle

- How to handle multiple loan requests for the same borrower

- Using ELM's Pending Certification Reports

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ALTERNATIVE /PRIVATE STUDENT LOAN PROCESS

Future Goals:

- File Transfer Process (FTP)

- Student Communication

- Multiple Certification Request for borrower

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