**User Stories- PennWest Financial Aid Veteran’s Database**

**Scenario**: A database for the Military and Veteran Student Success department to use for students that are accessing VA benefits.

**Persona:** School Certifying Official in the Military and Veteran Student Success Department

**Stories:**

* As a School Certifying Official, I want the ability to schedule automated emails regarding benefit certification so that I can efficiently communicate important deadlines and reduce time spent on student outreach.
  + **Acceptance Criteria:**
    - Given that I am logging in as a Certifying Official, I should be able to access and store email templates
      * Templates needed include a reminder to certify in 2 months, a reminder to certify in 1 month, and a reminder that certification is necessary immediately.
      * A template will be needed for students who are nearly out of aid that highlights other grant or scholarship opportunities.
    - Given that I have accessed the database, I should be able to select student parameters regarding the students aid and certification status
    - Given that I have accessed the aid and certification status, I should be able to schedule different emails to automatically send given search parameters
    - Given that I have scheduled an email, I should be able to view and manage the scheduled email
    - Given that I have scheduled an email, I should be able to cancel or edit any and all scheduled emails
    - Given that an email has been sent, only the information for the student in question should be sent
    - Given that an email has been sent, a copy will be stored in a log that can be accessed at a later time if needed
* As the Assistant Director, I want the ability to access a report of students who have not completed VA certification for the current or upcoming semester so that I can ensure all eligible students are accessing their aid.
  + **Acceptance Criteria:**
    - Given that I have accessed the database, I should be able to access reporting options
    - Given that I have accessed the reporting options, I should be able to generate a report that shows which students have certified for the upcoming semester on the VA website, including their names, student IDs, and contact information and aid type
    - Given that I have accessed the reporting options, I should be able to schedule emails to the chosen students based on the results of the report
    - Given that I have accessed the reporting options, I should see the most up to date certification information for students
      * The Military and Veteran Student Success department will update VA data for each student as it is received
      * There is only one type of certification, but many types of aid from the VA
      * The reports do not need to include historical certification data, only outstanding certifications that need to be completed
* As the Assistant Director, I want to identify students with expiring VA benefits so that I can proactively inform them about alternative aid options and prevent gaps in their financial support.
  + **Acceptance Criteria:**
    - Given that I have accessed the database, I should be able to access reporting options
    - Given that I have accessed reporting options, I should be able to filter active students that have less a specific amount of aid left.
      * Timeframe should be customizable in monthly increments up to 6 months
    - Given that I have accessed reporting options, I should be able to filter using customizable options if needed.
    - Given that I have accessed reporting options, I should be able to send an automated email to the students that meet the filter criteria.
      * The filter criteria should include student ID, student name, email address, phone number, aid balance, and aid type.
    - Given that I have accessed reporting options, I should be able to send different levels of alerts to students depending on how much time they have remaining.
      * At 9 months an alert should be sent out letting the student know that they should apply for scholarships from the university as well as explore additional aid opportunities that will be listed in the email
      * At 6 months an alert should be sent out letting the student know that they should explore other aid options with recommendations on where to locate aid
      * At 3 months an alert should be sent out letting the student know that they will not have aid for the next semester

**IMPORTANT: We cannot calculate the remaining financial aid on a rolling basis as we do not have the VA schedule or algorithm to know how they calculate aid used. The aid balance will be entered by the financial aid department staff as the information is received from the VA.**

* As the Director of Military and Veteran Student Success, I want to manage user access and permissions within the VA benefits database so that I can ensure data security and appropriate feature access for my team.
  + **Acceptance Criteria**
    - Given I am logged in as a manager, I can create new user accounts for department staff.
    - Given I am managing a user account, I can assign or modify user accounts and their system permissions.