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

**Scenario**: A database for the financial aid department to use for students that are accessing VA benefits.

**Persona:** Employee in the financial aid department at PennWest

**Stories:**

* As a member of the financial aid department, I want the ability to schedule automated emails to students so that we don’t have to spend so much time contacting each student individually, while also efficiently communicating with the students and making sure they are informed quickly of what they still need to accomplish. This should occur two months before the start of the semester, one month before the start of the semester, and then once weekly in the month leading up to the semester start.
  + **Acceptance Criteria:**
    - Given that I have accessed the database, 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 a member of the financial aid department, I want the ability to access a report that shows all students who have not certified on the VA website for the current semester so that we can make sure all students are accessing the aid that they are entitled to.
  + **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 financial aid 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 a member of the financial aid department, I want the ability to access a report that shows all students who have less than two months left of aid so that we can alert them to a change in their aid status for next semester.
  + **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.**

**(Until meeting with people in charge of University IT, we are unable to be more specific about integration with existing systems and databases + security)**