**Project Scope Statement**

**Project Title:** PennWest Financial Aid Veteran’s Database

**Problem Description:**

The Financial Aid department at PennWest is overburdened with information pertaining to students that use benefits provided by the U. S. Department of Veteran’s Affairs (henceforth referred to as “the VA”), but with no real centralized way to track and update the information. Students using VA benefits have to certify monthly that they are attending full time classes and submit a benefits renewal on the VA website before the beginning of each semester. The financial aid department has to track that they have received the benefits renewal before each semester begins and if they have not received it they have to reach out to the students who are missing the renewal. There is no automated system to send out reminder emails to students that are required to certify and there is no centralized way for these students to access the amount of aid they have left.

These inefficiencies lead to poor tracking of student certifications and require manual communications with students as reminders to renew. The financial aid staff must also keep record of who they have contacted, but they only way that they currently have to accomplish keeping a log is to save the sent emails since there is not a centralized log for student communications. This process is arduous for staff and can make certifying confusing and stressful for students.

**Project Objectives:**

* + Develop a database to track VA information for eligible students
* Implement automated communication system for student reminders
* Allow filtering and reporting for different student situations and aid types
  + Filtering for months/days of aid left
  + Filtering for GI Bill(Post 9/11 or Montgomery), VR&E aid, National Guard Tuition assistance, etc.
* Provide a secure portal for students to access aid balance and pending tasks
  + Potentially add access to the interface from student’s myPennWest account
* Develop a user-friendly interface for financial aid staff to manage student information

// I don’t believe students are accessing the portal , or are they ? We’ll need to discuss this with IT.

**Anticipated Business Benefits:**

This system will increase the efficiency of the financial aid department’s operations and reduce stress of the staff during the months and weeks leading up to each new semester by tracking the students benefits automatically, reminding students with automated communications instead of manually generated communications, and providing the financial aid staff with filtering and reporting abilities in a centralized database specifically for students using VA benefits. This project will also lead to improved student satisfaction and retention rates due to the enhanced certification experience, which includes comprehensive record keeping and updates for their benefits and VA certifications. These students won’t have to keep track of additional steps for securing their benefits each semester, because this project will assist the financial aid department in providing the reminders. With the alleviation of stress, we anticipate that the students will feel valued and important to the PennWest community and will lead to an increase in recommendations of the institution to their acquaintances or community members. This will create a positive community view of PennWest as a veteran friendly organization, which can potentially increase enrollment owing to positive word-of-mouth recommendations.

**System Capabilities:**

This system will satisfy the above-mentioned business benefits by:

* Sending automated reminder emails to students two months before the new semester, and then each week for four weeks leading up to the semester start.
* Tracking the certifications in a concise and easily accessible way so that the financial aid staff can quickly assess who still needs to complete certifications.
* Send out automated emails with potential resources for additional aid to any student that has exhausted the current aid
* Provide a way for students to access their aid balance and any tasks that need to be completed.
* Monitoring financial aid balances for each student and provide a way for the financial aid department to quickly filter students by type.

**Project Scope:**

**In Scope:**

This project is to develop a database for VA benefit information for PennWest Students with an included staff interface for managing student information. We will implement an automated email system for reminders and notifications of various types that can be modified by staff in the financial aid department. Reporting tools will be built in so that the staff has easy access to student information by aid type, aid balance, or certification status. Pending IT approval, this would also include a student portal to access the VA benefit information that PennWest monitors for enrollment.

**Out of Scope:**

This will not include direct integration to the VA website or any additional monthly certification that the student has to complete directly through the VA. This project will not track or modify any existing PennWest financial aid systems and will not provide management of financial aid that is separate from the VA such as state or federal grants. This will not keep track of FAFSA information for students. Financial Aid Staff will need to enter benefit information for each student into the database as it is received from the VA, the system cannot automatically keep record of the remaining VA benefits since there isn’t integration with the VA website, but it can store the information for reporting and reminder purposes.

**Risk Analysis:**

**Potential Risks:**

We would have to construct a database to store all of the student’s information along with an interface and options for automated or pushed out pre-drafted emails. The only risks would be associated with direct student access to the database to monitor their information. This may be difficult to achieve as integration with existing PennWest systems could present challenges regarding data security and privacy concerns. Due to these concerns, the IT department may not approve student access to the system.

To mitigate risks, we will be sure to initiate early engagement with the IT department to address any concerns about the project. We will conduct thorough testing of system integrations at frequent intervals and implement robust security measures.

**Constraints and Limitations:**

We will be limited in that we cannot directly connect to the VA’s website for the students to complete monthly certifications directly from the PennWest website, they will still have to complete monthly certifications through the VA, we will just be able to send reminders. We will also be limited to times that the financial aid office is not overburdened for collecting stakeholder information, user stories, and implementation when the time comes.

As a team, we certainly have the tools and abilities to construct a database that can generate reports and support querying and searching. I also feel that we have adequate scheduling resources for completion of the project, as it is uncomplicated, and we will have three individuals working for several months.

**Timeline and Resources:**

The estimated project duration will be from September 24, 2024, through April 15, 2025. We will have three team members with database development and project management skills working part time on the project throughout the duration. The key stakeholders are the Financial Aid Department, the IT Department, and the student Veterans.

**Success Criteria:**

* 90% reduction in manual communication efforts regarding VA certifications
* 95% of students utilizing VA benefits will complete certifications after implementation
* Financial Aid staff report 75% improvement in efficiency for VA benefit management
* Student satisfaction with PennWest VA benefit process improves by 40% (based on surveys)