



## Submission for the 2021 Larry L. Sautter Award

**Project Title:** CampusLogic StudentForms Implementation Phase II

**Submitted By:**

Mel Fernando

Business Systems Analyst, Enterprise Student Management Systems

Office of Information Technology

University of California, Irvine

**Project Strategic Leadership:**

Christopher Shultz

Director, Enterprise Student Management Systems

Office of Information Technology

University of California, Irvine

Patricia Morales

Associate Vice Chancellor, Enrollment Management

Project Executive Sponsor

University of California, Irvine

Rebecca Sanchez

Director, Financial Aid and Scholarships

Project Business Sponsor/Business Owner

University of California, Irvine

**Project Team Core Contributors:**

Olivia Garcia - Associate Director, Enterprise Applications, Financial Aid & Scholarships

Benjamin Shaver - Associate Director, Policy and Training, Financial Aid & Scholarships

Kookie Vu - Associate Director, Financial Aid & Scholarships

Vanan T Pham - Compliance and QC Coordinator, Financial Aid & Scholarships

Scott Lusby - IT Supervisor, Office of Information Technology (OIT)

David Wooldridge - Programmer Systems Analyst

Sachin Shorey – Senior Project Manager, Office of Information Technology (OIT)

Mel Fernando – Business Systems Analyst, Office of Information Technology (OIT)

**Project Senior Leadership and Sponsors**

Kian Colestock, Chief Information Officer and Associate Vice Chancellor, OIT

[kcolestock@uci.edu](mailto:kcolestock@uci.edu)

Thomas Andriola, Vice Chancellor, Information, Technology and Data, UCI,

[tom.andriola@uci.edu](mailto:tom.andriola@uci.edu)

**Project Summary:**

CampusLogic StudentForms implementation project replaces key FAFSA verification functionality that resides in the FAME legacy system and moves it to the CampusLogic StudentForms product. This new financial aid product will significantly enhance the student and staff experience through a more efficient process, a user-friendly interface, responsive communication, and multi-platform document submission that expeditiously handles the application to completion.

**Problem Statement:**

The FAME legacy system is used by the Office of Financial Aid for the Free Application for Federal Student Aid (FAFSA) verification process. This in-house developed system is based on an older technology that is specifically customized for the business needs of UCI. The system requires intensive yearly maintenance and updates to stay current, resulting in utilization of a large amount of resources, time, and coordination. In addition, the legacy system does not adequately support today's student expectations, such as the ability to electronically sign documents or use mobile devices to manage their FAFSA verification application.

**Solution:**

To effectively transition from an older legacy system into a more up-to-date solution, the new system must have the capability to integrate well with a variety of environments including the university in-house systems, document management system, and other web services provided by the university or the Department of Education. CampusLogic StudentForms delivers well on these needed capabilities and reinforces the following qualities that promotes and advances the University's mission.

➤ **Fosters Positive Change through Enhanced Student Experience:**

- Facilitates quick and clear communication with students and parents on their verification status at their convenience.
- Students can immediately see their assigned tasks using CampusLogic StudentForms online workflow.
- Students and parents have the ability and freedom to securely upload documents from their preferred location at any time.
- Students and parents can electronically sign documents and thus reduce time and effort from manual printing, signing and sending of the documents.

➤ **Effective Innovation:**

- As the project faced challenges on bridging the legacy system architecture and data structure with the new cloud-based solution, the Office of Information Technology was able to effectively come up with well thought out and creative solution. For example, the project encountered significant gaps on how the verification status, grouping of related student information records and other related data are processed in the legacy system versus the new solution. The IT team was able to successfully resolve these gaps by finding creative and elegant system design solution that prevents potential issues in the future.

➤ **Improved Operational Efficiencies:**

- Automated email communication with students significantly reduces time spent following up with students to complete critical tasks.

- Staff spend less time on verification with paperless file review reducing the manual processes.
- Financial Aid staff are able to seamlessly manage student workflow-based tasks and communication for the verification process.
- Designated Financial Aid staff have the ability to make system configuration changes for the academic year and thus significantly reduce the need for the IT team resources, coordination and support.

➤ **Demonstrated Collaboration:**

- As COVID-19 started midway through the project, it immediately presented significant challenges for the students and the Office of Financial Aid. Since students are unable to physically provide the required documentation on campus and limited staff availability on-site, this became a significant challenge to the Financial Aid process as the deadline dates for the required documents draws near. The project team consisting of the Financial Aid business subject matter experts, Office of Information Technology, CampusLogic business and technical experts worked diligently and expeditiously together in providing paperless electronic solution on time without impacting the overall project. As a result, the major risks has been averted and became a major win for the students and the university.

**Technology:**

CampusLogic StudentForms is a financial aid SaaS product solution that automates and simplifies workflows for both the student and financial aid staff and is accessible through a variety of platforms including mobile devices. Provided below are the feature details that the system solution offers to this project, significantly benefiting both the student and staff.

➤ **Capability for staff to review and correct Institutional Student Information Records (ISIR) for the Department of Education.**

Smart File Review   **Full File Review**

Full File Review contains a list of all ISIR Fields grouped by ISIR section. ?

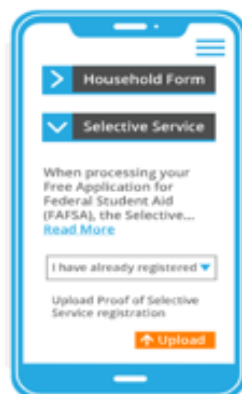
Use the pull down menu options to filter the fields being viewed.

Student Info ▼

ISIR Fields	ISIR Value	
Student's Last Name	<input type="checkbox"/> Confirm <input type="checkbox"/> Blank	
Student's First Name	<input type="checkbox"/> Confirm <input type="checkbox"/> Blank	
Middle Initial	<input type="checkbox"/> Confirm <input type="checkbox"/> Blank	
Permanent Mailing Address	<input type="checkbox"/> Confirm <input type="checkbox"/> Blank	
Student's Permanent City	<input type="checkbox"/> Confirm	
Student's Permanent State	<input type="checkbox"/> Confirm	

- Multi-platform and mobile ready solution allowing the students to review and complete assigned tasks, fill out electronic forms and upload documents from any device.

campuslogic<sup>SM</sup>



- Staff ability to review and process application tracking activities with CampusLogic StudentForms.

Transaction:	2020 - 2021 Transaction 1	Student IRS DRT Code:	07	Dependency Status:	I
Status:	Reviewing file	Student IRS Display Flag:	B	V Group:	V1
Created on:	02/05/2020	Parent IRS DRT Code:		Comment Codes:	<a href="#">171</a>
<a href="#">View Current ISIR</a>		Parent IRS Display Flag:		EFC:	0

File Review
Student View

☐ Show Previous Versions

Select	Document Type	Status	Information	Date Submitted	Date Reviewed
✓	<a href="#">2020-2021 Independent Verification Web Form</a>	Not Reviewed		02/05/2020 05:18 PM	02/05/2020 05:24 PM
✓	<a href="#">Student's 2018 Signed Federal IRS Form 1040X</a>	Not Reviewed		02/05/2020 05:17 PM	02/05/2020 05:27 PM

- Automated and customizable email or text communication to the student, including reminders to ensure all outstanding CampusLogic StudentForms verification tasks are complete.
- Students and parents ability to electronically sign documents.

**Certification and Signatures**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

The student must sign and date this form.

Student's Signature

Date

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school.  
You should make a copy of this worksheet for your records.

E-Sign Password ?

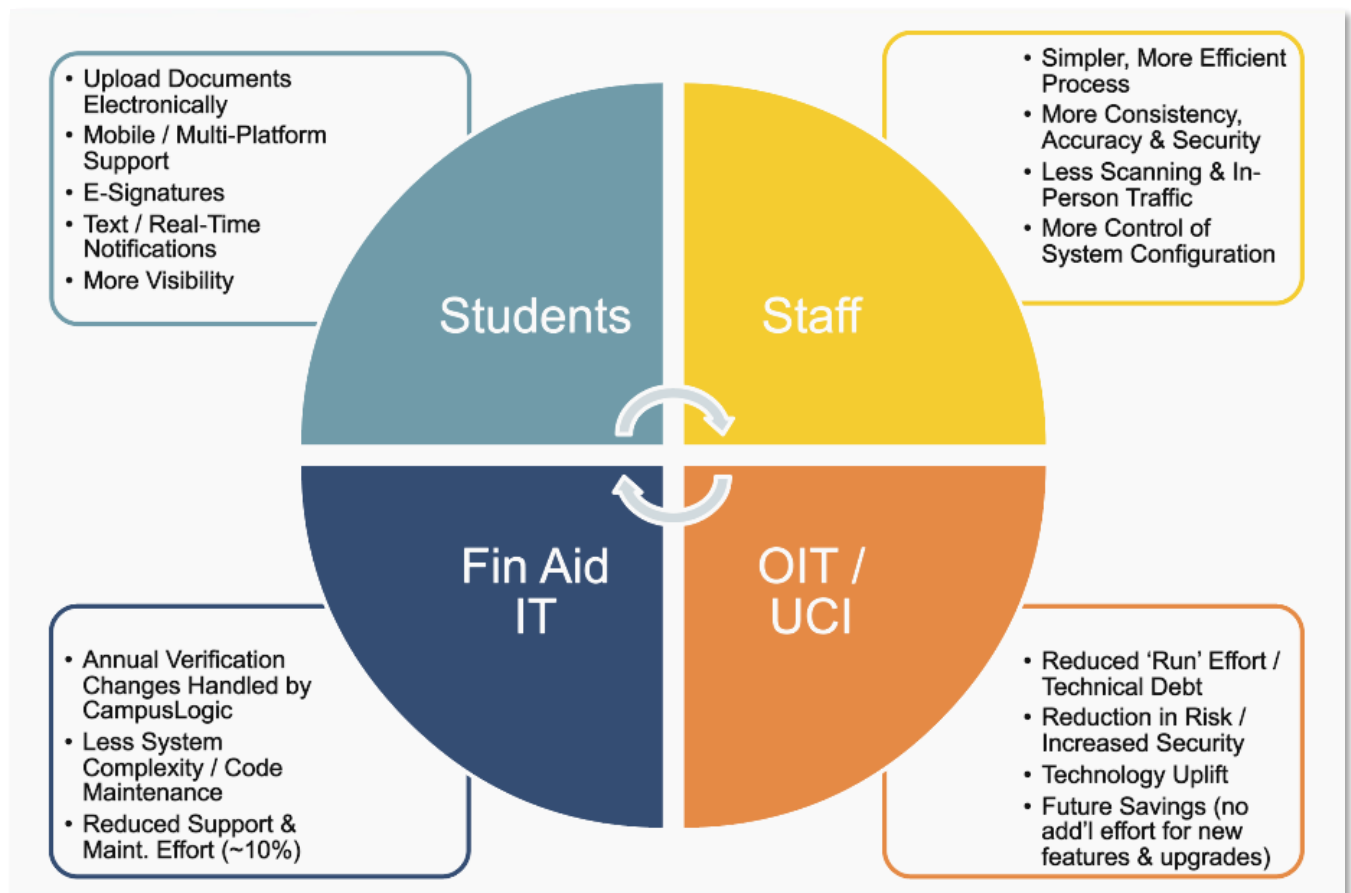
Opt out of E-Sign ?

☐ NO

← Back
E-Sign

**Conclusion:**

CampusLogic StudentForms implementation project successfully bridged the transition from an older legacy system to a more up-to-date and efficient solution that ultimately provides significant benefits to the student, staff, Financial Aid IT, and the Office of Information Technology (OIT) as illustrated below. It exemplifies Larry L. Sautter and UC IT Leadership Council's vision and commitment to technology, innovation and collaboration as well as advances the University's mission of teaching, research, and public service.

**Additional References:**

- CampusLogic StudentForms: <https://campuslogic.com/products/studentforms/>
- Case Studies: <https://campuslogic.com/success-stories/case-studies/>