HUMBOLDT STATE UNIVERSITY

ITS PROJECT REQUEST

Request Date: Sep 27, 2012

REQUESTER / SPONSOR INFORMATION

Requester	Brendan Brisker	**Ext**	5365	**E-mail**	Brendan.Brisker@humboldt.edu
Sponsor	Scott Hagg	**Ext**	6215	**E-mail**	Scott.Hagg@humboldt.edu

A statement of sponsor support should accompany all project requests and must be received by the proposal deadline.

PROJECT INFORMATION

Title Financial Aid Shopping Sheet

Level Campus-wide **Type** Customize Application

Purpose

The problem of	In a July 24th, 2012 letter to college presidents, Secretary of Education Arne Duncan asked for the voluntary adoption of a standardized, 1-page college costs letter, called the Shopping Sheet (see attached letter and example). Since HSU has also signed on to the "Principles of Excellence" for the treatment of Veterans (Pres. Obama's EO 13607), it is not voluntary, but a regulatory requirement to adopt the Shopping Sheet as the financial aid award letter to all student Veterans. Adopting this standardized Shopping Sheet for our entire student population will not only be easier than restricting it to just veteran students, it will allow all HSU applicants and students to make well-informed comparisons and decisions regarding their college costs and choices.
affects	HSU applicants and students, HSU Financial Aid Office
the impact of which is	Less well-informed applicants and students, some of whom may make poor decisions about returning to HSU or graduating (impacts retention and graduation rates). HSU is less competitive with other institutions that have adopted the Shopping Sheet.
a successful solution would be	Generate a .pdf file called from a button/icon in the myHumboldt portal that produces an individualized Shopping Sheet for each student on demand. Consultations with programmers suggest that PeopleSoft's XML Publisher functionality may be the best solution for producing this .pdf
Alternatives	1. Run a PeopleSoft query and produce a static, one-time email merge sent to students done by Financial Aid Office staff on a weekly basis as part of Financial Aid awarding. 2. PeopleSoft CommGen XML Template, query, and email to take the place of the current Financial Aid Award Notice email, static and generated once, but sent automated from PeopleSoft. 3. Modification of PeopleSoft Student Center to have a page display a dynamic Shopping Sheet on demand.
Alignment with Strategic Objectives	By placing the Shopping Sheet in the Portal, we would re-enforce the concept of a single location for students to go for information and university services. By giving applicants and students clear, standardized information regarding college costs, they will be able to make better decisions about their careers at HSU, which should in turn improve recruitment, retention, and graduation rates.
Deadline Date	4/1/2013 **Hard Deadline** ☒
Deadline Reason	The Shopping Sheet must be live for the new Financial Aid 2013-2014 year cycle so that all students will receive the same notification in the same aid year, and so applicants will be able to use the Shopping Sheet to make admission decisions by May 1.
Considerations / Dependencies	This project may have to dovetail with the Portal's Evolution cycles (?). The mechanism used to generate the .pdf will have to query an individual student's data from PeopleSoft Campus Solutions tables.
Resources	The Financial Aid Office would provide primary functional support for data definitions and other specs as needed. The data set is relatively straight-forward. Gary Noar has reviewed a preliminary version of this request and could be a programming resource. The Portal Content Coordinator Robin Jones will

Email completed project request form and written indication of support from the project sponsor to the ITS Project Office at itspo@humboldt.edu

also be a necessary resource to ensure that the Shopping Sheets fits Portal guidelines.

Estimate (Hard Costs Only)

Initial $0 **On-going** $0 **Funding Available** Yes ☐ No ☐

Explanation of Estimates: Only Analyst/Programmer time should be needed for this project, since the Portal has already been implemented.

Affected System / Module: MyHumboldt Portal, PeopleSoft Campus solutions (only to query data)

Other

As of early August 2012, the Financial Aid Product Advisory Group of the Higher Education Users Group (FAPAG of HEUG) is working with Oracle on an enhancement request to provide the Shopping Sheet in Financial Aid Self-Service. The FAPAG warns, though, that it is relatively late in Oracle's development cycle for the 2013-14 year to get such an enhancement in place. If Oracle does provide a delivered solution, it would no doubt be buried deep within PeopleSoft self-service. With that in mind, I believe we would still want a Portal button to call the PeopleSoft page, so this project may be truncated significantly but still very relevant and necessary.

On Sept. 30th, the US Dept. of Education released an HTML spec for the Shopping Sheet, which included integrating a button in the Shopping Sheet to download the data content as an XML file. Because we feel that this offers little if any enhancement for the user and may even confuse them, and because the US Dept. of Education only "encouraged" its implementation as part of the Shopping Sheet, we feel at this time that the best solution is to generate a .pdf file on demand that itself can be easily downloaded, saved, or printed by the user.

Email completed project request form and written indication of support from the project sponsor to the ITS Project Office at itspo@humboldt.edu

From: Scott K. Hagg
To: itspo .
Subject: Project Proposal - Financial Aid Shopping Sheet
Date: Tuesday, September 25, 2012 11:51:08 AM

Financial aid is complicated. It is even more complicated when every college produces their own financial aid award letter. Students have a hard time determining the true cost of attendance from one college to another and what type of aid they are receiving. The financial aid shopping sheet is an attempt by the US Department of Education to standardize the financial aid award letter. While not yet required by colleges and universities, it is a recommended best practice to adopt the form. It is anticipated the shopping sheet will be required in the coming years.

I believe going out early with the shopping sheet will provide current and future Humboldt State University students with a much clearer picture of their financial aid award package and the true out of pocket cost to attend college. I fully support this initiative and will work closely with Financial Aid staff on the development and implementation of this project.

Sincerely,
Scott Hagg
Interim Dean of Admissions and Enrollment Management

University of the United States (UUS)

Costs in the 2013-14 year

Estimated Cost of Attendance for full-time enrollment **$ XX,XXX** / yr

Tuition and fees	$ XX,XXX
Housing and meals (on-campus resident)	X,XXX
Books and supplies	X,XXX
Transportation	X,XXX
Other educational costs	X,XXX

Grants and scholarships to pay for college

Total Grants and Scholarships ("Gift" Aid; no repayment needed) **$ XX,XXX** / yr

Grants from your school	$ X,XXX
Federal Pell Grant	X,XXX
Grants from your state	X,XXX
Other scholarships you can use	X,XXX

What you will pay for the 2013-14 year

Net Costs **$ XX,XXX** / yr
(Cost of attendance minus total grants and scholarships)

Options to pay net costs

Work options

Work-Study (Federal, state, or institutional)	$ X,XXX / yr

Loan options*

Federal Perkins Loans	$ X,XXX / yr
Federal Direct Subsidzed Loan	X,XXX / yr
Federal Direct Unsubsidized Loan	X,XXX / yr

*Recommended amounts shown here. You may be eligible for a different amount. Contact your financial aid office.

Other options

Family Contribution **$ XX,XXX** / yr
(As calculated by the institution using information reported on the FAFSA or to your institution.)

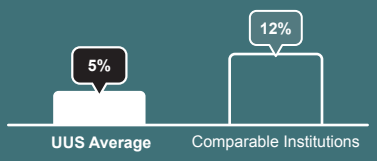
- Payment plan offered by the institution
- Parent PLUS Loan
- Military and/or National Service benefits
- Non-Federal private education loan

Graduation Rate

Percentage of full-time students who graduate within 6 years

Loan Default Rate

Percentage of borrowers entering repayment and defaulting on their loan



Median Borrowing

Students at UUS typically borrow **$XX,XXX** in Federal loans over **X** years. The Federal loan payment over 10 years for this amount is approximately **$X,XXX** per month. Your borrowing may be different.

Repaying your loans

To learn about loan repayment choices and work out your Federal Loan monthly payment, go to:
https://www.direct.ed.gov/calc.html

For more information and next steps:

University of the United States (UUS)
Financial Aid Office
123 Main Street
Anytown, ST 12345
Telephone: (123) 456-7890
E-mail: financialaid@uus.edu

Customized information from UUS

ED.gov

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Key Policy Letters from the Education Secretary or Deputy Secretary

July 24, 2012

July 24, 2012

Dear College President:

Getting students successfully through college and into the workforce is a shared responsibility among federal and state governments, institutions like yours, and students and families. In order to meet our national goal of producing the highest proportion of college graduates by the end of this decade, we must make it easier for parents and students to finance their college education and to understand their financial obligations. It starts with transparency.

Today, I am asking you to voluntarily adopt a new “Shopping Sheet” we have developed that clearly shows prospective students the cost of their college education. The “Shopping Sheet” reflects input from thousands of students, parents, college counselors, financial aid administrators, and other higher education officials. It is designed to be consumer-friendly while putting as little burden as possible on you and your institution. We believe the “Shopping Sheet” accomplishes both while allowing colleges to include additional financial aid information specific to each institution.

The “Shopping Sheet” can be viewed on the Department’s Web site at http://collegecost.ed.gov/shopping_sheet.pdf. And your institution may indicate its commitment to using this tool, or direct any questions regarding its adoption, to shoppingsheet@ed.gov.

Students should not have to wait until after they graduate to find out the size of their monthly student loan payment. Families choosing a college should have clear and comparable information in a common format to guide their choice. And no one should forego college because they think they cannot afford it.

Our goal is that more students will arrive at school each fall less worried about how they will pay for college and more focused on how they will complete college. We know that you share that goal, and so we hope that you will join your colleagues across the country who have already agreed to adopt the “Shopping Sheet” starting in the 2013-2014 school year.

Thank you very much for your consideration of this request, and for the important work you do every day to provide a quality college education to young people and adults and to help secure America’s future.

Sincerely,

/s/

Arne Duncan

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Last Modified: 07/24/2012