



Efficient, Personalized Financial Aid: Extending Banner with CampusLogic

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The #1 Barrier
to enrollment and a
degree is financial friction.



The Cost of Financial Friction



Financial friction

Any point of confusion or frustration encountered by a student on their funding journey.



**Students get lost in
complex processes
and unclear
communications.**


Challenges & Solutions

- Paper Forms = Paperless / Online Forms
- Disjointed Process = Seamless & Integrated Workflow
- Turnover = Scalable Solution
- Lack of Communication = Instantaneous Communication
- Complex Scholarship Process = Simplified One Stop for Scholarships
- Confusing Communications = Simplified and Clear Communications


StudentForms


Eliminating Complexity from Financial Aid Forms and Processes


StudentForms Student





Needs Action

 Verification


 Appeals

 Other Docs

 Activity


 Contact Us

StudentForms


 jess ▾

Needs Action


Manage Requests

 2022-2023 Verification
Verification

50%


 2022-2023 SAP Appeal
SAP Appeal

0%

 2022-2023 Emergency Fund Application
Emergency Fund Application

0%

Version 22.10.2608



StudentForms Workflow

StudentForms

Student search

A new release contains a group of bug fixes. [View the release notes here.](#)

Workflow

Award Year: All

Student Type: All

File Review

Files Available: 97
Files Pended: 4

Get Next File

View All

Document Review

Documents Available: 176
Documents Pended: 0

Get Next Document

View All

Subsequent ISIR File Review

Files Available: 2
Files Pended: 0

Get Next File

View All

Appeal Review

Category: All

Appeals Available: 14
Appeals Pended: 0

Get Next Appeal

View All

Other Documents Review

Documents Available: 1
Documents Pended: 0

Get Next Document

View All

Document Retrieval

Downloads Available: 1,039
Appeals Available: 4

View All

Verification File Review Workflow

Transaction Status

Award Year

Student Type

Ready for Review

All

All

Show Advanced Filtering

Date Ready	Student ID	First Name	Last Name	Award Year	Status	Status Date	Pending	Last Saved...	Last Saved By	Review
2/22/2022	J01 [REDACTED]	[REDACTED]	[REDACTED]	2022-2023	Reviewing file	4/12/2022		4/12/2022	n/a	
3/4/2022	J01 [REDACTED]	[REDACTED]	[REDACTED]	2022-2023	Reviewing file	4/20/2022		5/11/2022	Delia Gomez	

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Online Submission & Banner Integration

Transaction: 2022-2023 Verification Dependency Status: D Student IRS DRT Code: 00

Created on: 02/22/2022 02:18 PM V Group: V1 Student IRS Display Flag: C

Status: Reviewing file EFC: 0 Parent IRS DRT Code: 00

Last Status Update: 04/12/2022 08:28 AM Comment Codes: [001](#), [006](#), [028](#), [149](#), [View All](#) Parent IRS Display Flag: L

Available ISIRs:


Review Student View

	Document Type	Status	Information	Date Submitted	Date Reviewed
✓	2022-2023 Dependent Verification Web Form	Reviewed		02/22/2022 03:05:19 PM	04/25/2022 08
✓	Parent 1-2020 Federal IRS Tax Return Transcript	Reviewed		02/22/2022 03:05:19 PM	04/12/2022 08
✓	Parent 2-2020 Federal IRS Tax Return Transcript	Reviewed		02/22/2022 03:05:20 PM	04/12/2022 08

Student's U.S. Income Tax Paid		0	2022-2023 Dependent Verification Web Form	Match
Student Income Earned From Work	0	0	2022-2023 Dependent Verification Web Form	Match
Spouse's Income Earned From Work			No Documentation Provided	Match
Student's Educational Credits		0	2022-2023 Dependent Verification Web Form	Match
Student's Pension Payments	0		No Documentation Provided	Match
Student's IRA Payments		0	2022-2023 Dependent Verification Web Form	Match
Student's Tax Exempt Interest Income		0	2022-2023 Dependent Verification Web Form	Match
Parents' Marital Status	Married/remarried		No Documentation Provided	Ignored
Parents' Marital Status Date	06/2009		No Documentation Provided	Ignored
Parents' Number of Family Members	6	3	2022-2023 Dependent Verification Web Form	ISIR Correction
Parents' Number in College (Parents Excluded)	1	1	2022-2023 Dependent Verification Web Form	Match
Parents' Tax Return Completed?	Already completed	Already completed	Multiple Documents	Match
Parents Type of 2020 Tax Form Used?	IRS 1040	IRS 1040	Multiple Documents	Match
Parents' Tax Return Filing Status	Head of household		Multiple Documents	

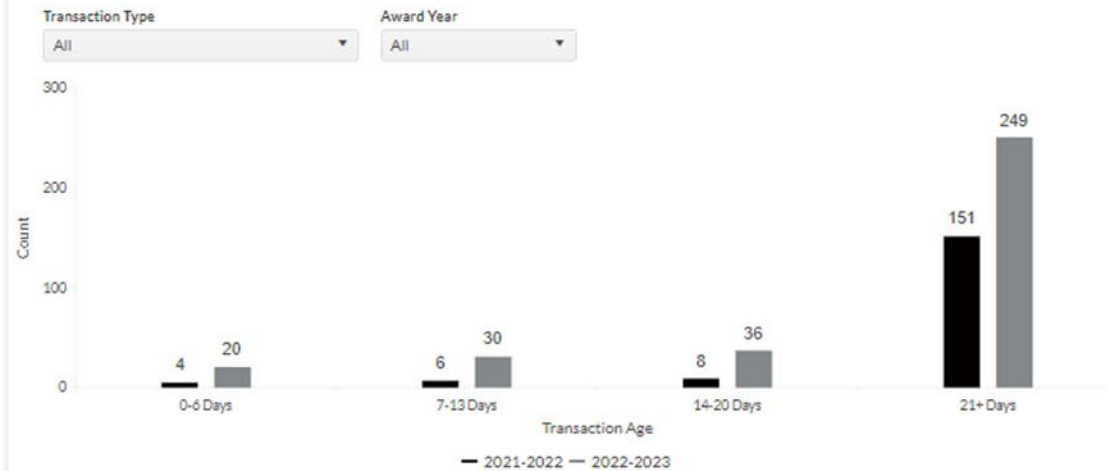
StudentForms Dashboard

Dashboard

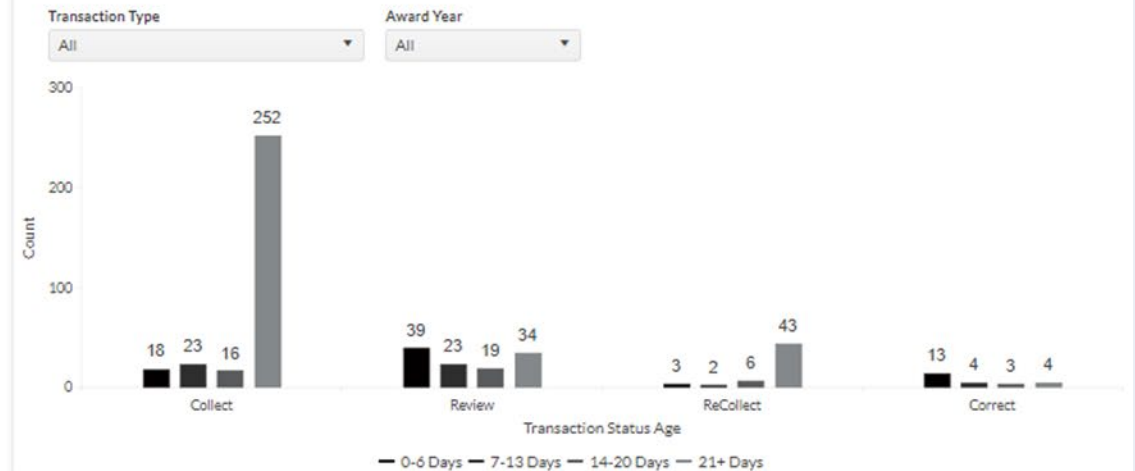
Last Update: 5 mins 



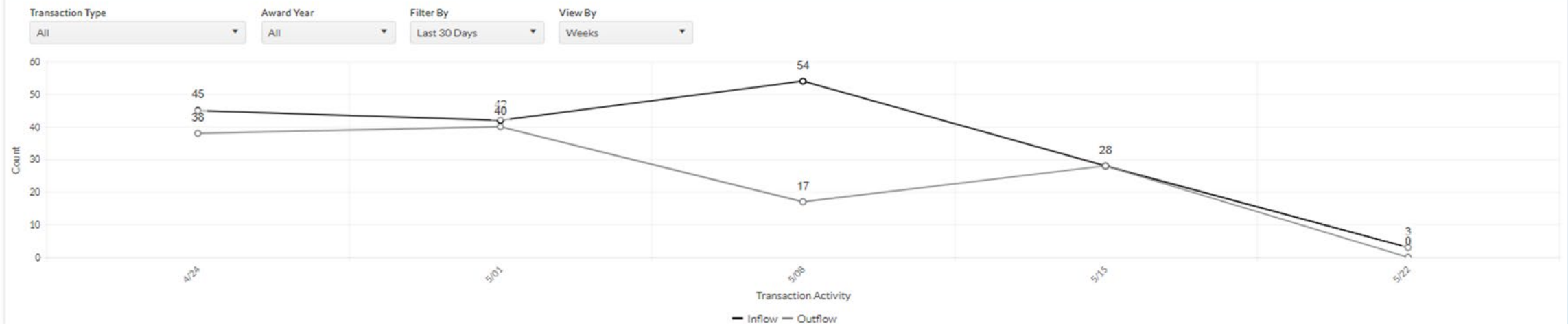
Transaction Aging



Transaction Status Aging



Transaction Activity



StudentForms Reporting

StudentForms

Student search

?

A new release contains a group of bug fixes. [View the release notes here.](#)

Reports

Generate Reports

Historical Reports

400/401 Status

Appeals

Deleted Student Documents

Document Status Report

FAO Activity

Identity Verification Results - V4/V5

Outstanding Student Documents

Outstanding Student Tasks

Parent Outstanding Signature Requests

Privacy Policy Opt-Out

Student ISIRs

Transaction Status

Unresolved Identity Verification - V4/V5


User Account Creation

Verification Group Change

ScholarshipUniverse

Unlocking Every Dollar for Our Students

ScholarshipUniverse Student



Search

jess

Dashboard

Questions

Scholarships

Applications

Awards

My Docs

Feedback


Tell Us About Yourself

A Universe of Scholarship Opportunities Await

Real, relevant scholarship opportunities are just a few minutes away! Based on your answers to the following questions, an adaptive matching engine will filter and display scholarship opportunities tailored specifically to you, your interests, goals, and accomplishments.

I'm Ready!

By using this site, you agree to the [Terms of Use](#)



Search

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Dashboard

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Feedback

Scholarships

Sort: Amount: Low To High Filter

Matches Pinned Partial Matches Application Submitted Non-Matches Not Interested

American Scholar Award

AMOUNT

\$250

ORGANIZATION

College of Psychology

APPLY BETWEEN

1/1/2019 - 12/31/2023

STATUS

Open

Apply

View

Big Bang Physics Scholarship

AMOUNT

\$300

ORGANIZATION

College of Math & Science

DEPARTMENT

Department of Physics

APPLY BETWEEN

1/1/2019 - 12/31/2023

STATUS

Open

Apply

View

Michael Marion, MD: Health and Wellness Scholarship

AMOUNT

\$500

ORGANIZATION

External Scholarship

APPLY BETWEEN

5/1/2018 - 12/31/2022

STATUS

Open

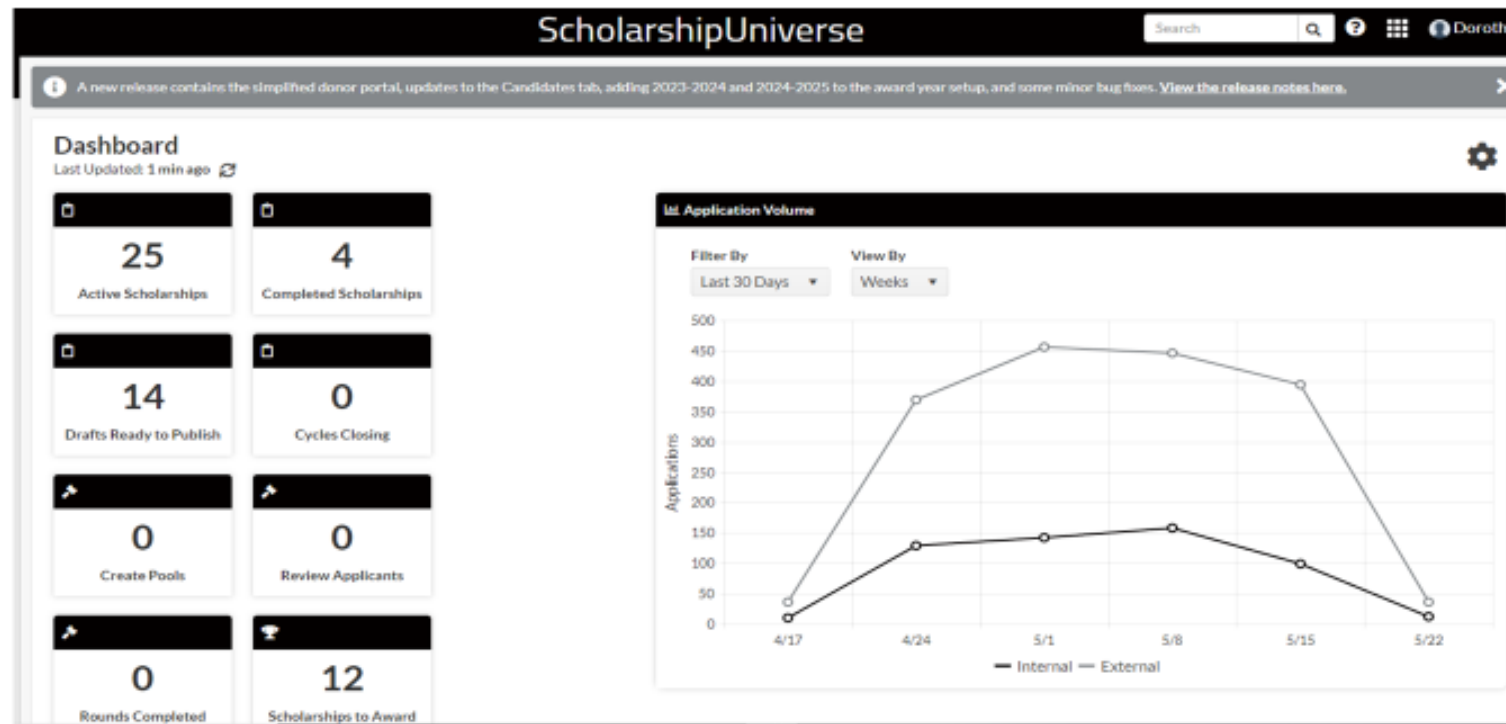
Apply

View

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ScholarshipUniverse Dashboard

ScholarshipUniverse Dashboard



Review and Awarding

Scholarships

[Filter](#)[Import](#)[Export](#)[Add](#)

[Draft \(14\)](#)[Active \(28\)](#)[Review \(0\)](#)[Award \(18\)](#)[Completed \(4\)](#)[Archived \(50\)](#)

Sort by...

<h3>Financial Literacy of South Texas Foundation Scholarship 2nd round deadline</h3> <div>Open</div> <div><div>Created: 5/13/2022</div><div>Open Date: 5/13/2022</div><div>Deadline: 6/30/2022</div></div> <div><div>Cycle: 2022-2023 Financial Literacy Application</div><div>Organization: Office of Student Financial Aid & Scholarships</div><div>Award Year: 2022-2023</div></div> <div><div></div><div></div><div></div></div>
<h3>San Antonio Institute of Internal Auditors Scholarship</h3> <div>Open</div> <div><div>Created: 3/28/2022</div><div>Open Date: 10/1/2021</div><div>Deadline: 6/30/2022</div></div> <div><div>Cycle: 2022-2023 Application (2nd Round Deadline)</div><div>Organization: Office of Student Financial Aid & Scholarships</div><div>Award Year: 2022-2023</div></div> <div><div></div><div></div><div></div></div>
<h3>Melissa Sanchez Scholarship</h3> <div>Open</div> <div><div>Created: 3/22/2022</div></div> <div><div>Cycle: 2022-2023 Application (2nd Round Deadline)</div></div> <div><div></div><div></div><div></div></div>

ScholarshipUniverse Reporting

ScholarshipUniverse

Search

A new release contains the simplified donor portal, updates to the Candidates tab, adding 2023-2024 and 2024-2025 to the award year setup, and some minor bug fixes. [View the release notes here](#)

Reports

External Scholarship Volume

Incomplete Application

Internal Application Details

Internal Application Volume

List Criteria Usage

Matched Not Applied

Organization Scholarships

Question Usage

Question/List Values

Scholarship Criteria

Batch Applications

Review Details

Award Details

Batch Thank You Letters

Scholarship Code

Student Award Actions

Thank You Letter Data

Organization Users

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CampusCommunicator

Drive Comprehension and Action

FINANCIAL AID AWARD LETTER

UNIVERSITY

Prepared for _____ for _____

ID: _____

ACCEPT BY: _____

The Financial Aid Office is pleased to provide this official offer of financial assistance for the 2016-2017 academic year. Our entire staff looks forward to assisting you during your enrollment at _____ University. To accept or decline these awards, please log into your _____ Portal. A step by step guide entitled "How to Accept Financial Aid on Portal" is enclosed.

Gift Aid (Scholarships and Grants).

Award Description	Fall	Spring	Total
Incentive Award	11,000.00	11,000.00	\$22,000.00
Grant - New	3,500.00	3,500.00	\$7,000.00
Federal Pell Grant	2,908.00	2,907.00	\$5,815.00
Total Gift Aid	\$17,408.00	\$17,407.00	\$34,815.00

You are eligible for these Other Aid Programs (Loans and Work Study) to assist in covering your Out of Pocket Costs:

Award Description	Fall	Spring	Total
Direct Sub Stafford Loan	1,750.00	1,750.00	\$3,500.00
Direct Unsub Stafford Loan	1,000.00	1,000.00	\$2,000.00
Direct PLUS (Parent) Loan	10,675.00	10,675.00	\$21,350.00
Total Loans and Work Assistance	\$13,425.00	\$13,425.00	\$26,850.00

To help you understand how these awards will assist you in paying for your education, please consider the following information. Your Cost of Attendance (COA) consists of the following Direct and Indirect expenses and is based on your status as a Resident student. (Note that costs may be estimated or averaged.)

Direct Expenses (paid directly to)		Indirect Expenses (estimated personal expenses):	
Tuition:	41,120.00	Books and Supplies:	800.00
Fees:	1,902.00	Transportation:	600.00
Room:	12,016.00	Personal Expenses:	1,628.00
Board (Meal Plan):	3,600.00	Living Allowance:	
Total Direct Expenses:	\$58,638.00	Total Indirect Expenses:	\$3,028.00
		Total Cost of Attendance	\$61,666.00

Your Out of Pocket Cost (Cost of Attendance minus (-) total Gift Aid) is \$26,851.00 for the 2016-2017 Academic year. This offer is based on your Expected Family Contribution (EFC) of 0. Your expected enrollment is 12 or more credits per semester. Additional information, including Estimated Cost of Attendance for additional years can be found at: <http://www.edu/financial-aid/sites/edu.financial-aid/files/Interim-NY-State-FA-Award-Info-Sheet.pdf>.

Please note: This offer supersedes any offer previously made for this academic year.

Traditional PDF Award Letter

Three Ways to Optimize Your Award Letter

- ✓ Use visuals and dynamic media to improve student comprehension
- ✓ Strategically outline your offer (separate loans from grants, clearly outline next steps and deadlines)
- ✓ Test your award offers with student staff





Three Ways to Optimize Communications Around Cost

- ✓ Emphasize value and highlight your unique brand
- ✓ Personalize the experience
 - Distribute engagements based on student type, program,
- ✓ Outline clear next steps

CampusCommunicator

Your clarifying engagement tool to help reduce student melt



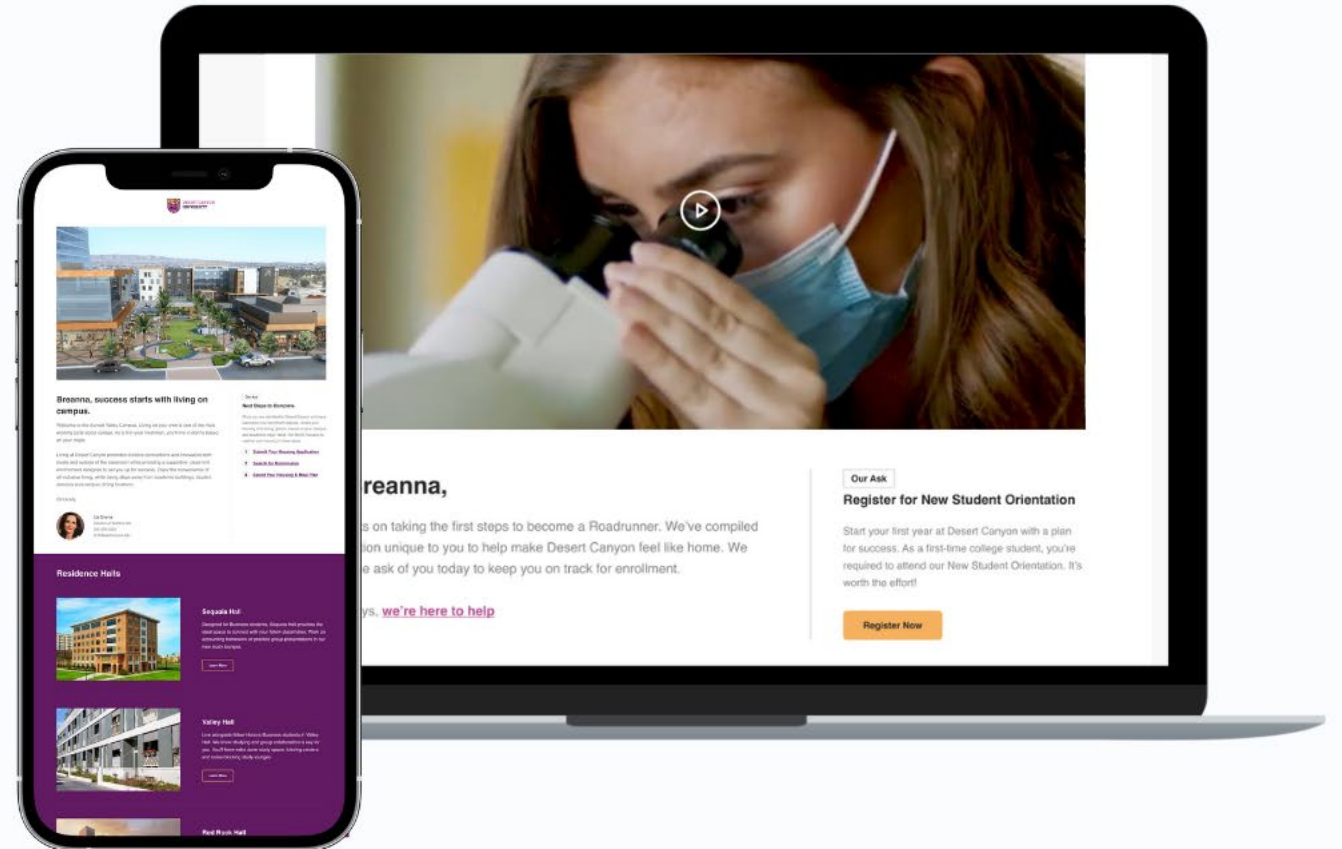
Personal
web experiences



Low-effort
comprehension



Jargon-free
next steps



A smiling woman with dark hair, wearing a blue denim shirt, is holding a black smartphone in her hands. She is looking down at the phone. The background is a blurred indoor setting with a window on the right.

campuslogic®

Thank You