

TECHNOLOGY SOLUTIONS CASE STUDY



Jacksonville State University Transforms Financial Aid Services with the Ellucian SaaS Platform

JACKSONVILLE STATE UNIVERSITY

Established in 1883, Jacksonville State University (JSU) is a public university in Jacksonville, Alabama, serving approximately 9,600 students. JSU includes five colleges and offers 101 academic programs and concentrations to earn bachelor's, master's, post-baccalaureate, and doctoral degrees and advanced certificates. JSU also offers more than 40 online programs. The institution describes itself as the "Friendliest Campus in the South," with a mission to provide distinctive educational, cultural, and social experiences for a diverse student population. JSU strives to offer students a quality education at an affordable price through robust scholarship opportunities and financial aid support.

As a contextual note for this case study, StudentForms, ClearCost, and VirtualAdvisor were CampusLogic products. Ellucian acquired CampusLogic in 2022, and this case study refers to Ellucian's updated product names.

INCOMING JSU LEADERS OFFER SOLUTIONS TO FINANCIAL AID CHALLENGES

Jacksonville State University outsourced its financial aid administration until 2018, when it restructured to handle financial aid processing internally. At the time, students selected for financial aid verification used the university's campuswide electronic forms platform to fill out the verification form and submit their required documents. The verification form was lengthy and complex, and it was common for students to require support to complete it. JSU also had to dedicate multiple staff members to reviewing the submitted forms, leaving less staff available to meet with students who required assistance in person.

In 2018, JSU hired a new director of financial aid, Jessica Wiggins, who has since transitioned to associate vice president of enrollment management. Wiggins embraced the university's financial aid restructuring as an opportunity to optimize the existing financial aid processes. Wiggins had worked with a colleague, Charlotte Cole, at another institution to implement StudentForms, which had drastically decreased the institution's financial aid processing time. The StudentForms solution, powered by Ellucian SaaS, simplified financial aid for both students and staff, providing mobile document upload capabilities and prefilling of student forms while incorporating automation and built-in compliance to streamline the processes for financial aid verification, professional judgments, Satisfactory Academic Progress appeals, and C code resolution.

JSU hired Charlotte Cole as associate director of financial aid in January 2019 (Cole has since transitioned to director of financial aid). She and Wiggins worked with JSU to purchase and implement StudentForms and Ellucian's mobile-optimized net price calculator ClearCost. Cole says they selected ClearCost because, unlike the standard federal net price calculator, ClearCost enabled JSU to add its merit-based scholarships, presenting students with all their financial aid options in one place. JSU also branded the net price calculator, making it a valuable tool for recruiters to use to offer prospective students insight into their personalized aid options and out-of-pocket costs.

JSU IMPLEMENTS STUDENTFORMS AND CLEARCOST IN THREE MONTHS

Since Wiggins and Cole had implemented StudentForms at their previous institution, they went into JSU's implementation understanding what was required to reach their desired outcomes. Cole explains that they had learned how critical it is for functional staff who would use the products daily to participate in the implementation. Before starting the implementation, Cole and Wiggins brought together the financial aid staff and IT team to communicate the project's goals and how the new solutions would positively impact students. They also set workload expectations early, delineating the tasks required from financial aid staff and IT.

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With a unified team and clear vision, JSU was able to implement StudentForms and ClearCost in approximately three months (with the StudentForms portion taking about one month). The JSU IT team worked with Ellucian IT staff to integrate the platform with their Ellucian Banner Student and Financial Aid system, their single sign-on (SSO) solution, and the university's document imaging software. As JSU's implementation project manager, Cole worked with the Ellucian project manager to migrate the financial aid files from the current year to the Ellucian SaaS platform. They also worked together to provide hands-on staff training. JSU's financial aid staff ensured the solution's setup and configuration were optimal for their requirements, easing the transition to the new platform and mitigating disruptions in critical financial aid operations.

Wiggins says the ClearCost implementation was not as IT heavy. The implementation team worked with JSU's marketing services team to brand the net price calculator appropriately. The JSU branding lent validation to the tool, ensuring students understood that they could trust it to provide reliable financial aid and out-of-pocket cost estimates. JSU's admissions team has been a significant proponent of ClearCost since it has enabled them to address prospective students' financial concerns on the spot, instilling confidence as they make critical life decisions.

JSU IMPLEMENTS VIRTUALADVISOR

In fall 2021, JSU implemented VirtualAdvisor (an AI-powered digital assistant/chatbot) to ensure students received around-the-clock immediate responses to their COVID-19 and financial aid-related questions. Cole says the VirtualAdvisor implementation was simple because the institution had already integrated SSO with the platform. VirtualAdvisor came preprogrammed with general COVID-19 and financial aid content to provide answers to frequently asked questions and information requests, and explanations of financial aid-related terminology. The JSU team focused on providing JSU-specific financial aid information to customize VirtualAdvisor, then embedded the VirtualAdvisor code on the university's financial aid website and in the StudentForms platform. JSU has also begun to implement VirtualAdvisor on other student services pages. Cole is working with a team to determine which student services they want the chatbot to support so they can add appropriate custom content.

STUDENTFORMS BENEFITS

Cole recalls that, in the past, JSU had to dedicate counselors solely to reviewing financial aid documents and verification forms for errors. Staff manually compared paper forms to the

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Department of Education Institutional Student Information Report (ISIR) information online and sent individual emails to students about discrepancies. Addressing the errors took time, delaying financial aid packaging. Today, StudentForms enables students to take a photo of their documents to upload them. The platform also prefills student financial aid verification forms, leveraging each student's ISIR information and comparing it to the student's Banner profile. It automatically flags discrepancies in the verification form for students to address. The efficiencies StudentForms provides have condensed the time it takes for JSU to process financial aid verification from weeks to hours.

CLEARCOST BENEFITS

Since JSU has a robust institutional scholarship award that provides approximately 95% of students with merit-based scholarships, the university needed an accessible and reliable net price calculator to support student decision making as early as possible. After implementing ClearCost, JSU saw a 27.63% increase in net price calculator completions from 2018 to 2019. Wiggins says that ClearCost has removed the guesswork for students, and they no longer need to sift through a list of scholarships on the JSU website trying to understand which options may apply to them. Ellucian handles automatic updates for ClearCost to ensure students see the most up-to-date options and financial aid eligibility information.

ELLUCIAN ENABLES TRANSFORMATION

Wiggins and Cole report that the Ellucian platform has revolutionized JSU's financial aid office culture by enabling staff to direct their energy toward counseling and engaging with students and families. Previously, staff spent most of their time walking students and parents through the financial aid verification process. Staff can now address students' affordability concerns immediately rather than needing to work through gathering their paperwork first. Cole notes that through Ellucian SaaS, updates are automatically rolled out in alignment with the government's regulatory changes, which was invaluable during the COVID-19 pandemic and continues to be crucial as FAFSA Simplification Act (Act) changes go into effect. Ellucian SaaS

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deployment provides delivered integration that ensures regular communications with JSU about platform updates, upgrades, and enhancements.

Since implementing Ellucian StudentForms, ClearCost, and VirtualAdvisor, the JSU financial aid office has experienced more than a 90 percent decrease in walk-in traffic. Cole says that today, roughly 87 percent of JSU first-year students have already received their financial aid packages when they arrive for orientation. Since the students know how much aid they will receive, they can meet with financial aid staff to discuss plans for affording their out-of-pocket expenses. Staff now have the bandwidth to provide focused just-in-time support to students at critical points, addressing expenses before they become a barrier to student success.

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REFERENCES

Tambellini interviewed Jacksonville State University Director of Financial Aid Charlotte Cole and Associate Vice President of Enrollment Management Jessica Wiggins for this research. Tambellini also used publicly available information.

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