RFP# UCA-25-010 Customer Relationship Management for SEVIS Reporting

Questions and Responses

1. (CPT), Optional Practical Training (OPT), Extension of Stay, F1 and J1 Visa, transfer into and out of UCA, export control etc. – **Would the CGLE office planning to create these forms within the system, or are they looking to automate the tracking of forms uploaded into the Banner SIS system?**
    - Response: We are looking to create CPT and OPT and perhaps other applications in the purchased CRM not in Banner

2. Provide a detailed description regarding the methods used to integrate with Cashnet or provide feedback on your ability to integrate with industry standard payment gateways – **What type of fees would pass through the payment gateway?**
    - Response: Currently we only need the Payment portal in the Education Abroad application CRM to collect our application fee.

3. **RFP Reference: Integration Student Data with Banner and SEVIS**

- **Question:** What specific data fields in Banner, such as student enrollment status, program start and end dates, and academic level, are crucial for syncing with SEVIS to issue I-20s and DS-2019s?
    - Response: Basic demographic information, visa and passport information, academic level, current credit hour enrollment, major, GPA, etc. A full list of data fields can be provided at the appropriate time.
- How are these fields formatted—do they use standard ISO date formats, and are status codes represented as integers or strings?
    - Response: Banner data is stored in an Oracle 19c Enterprise database. Most character fields are varchar2. “Status” fields could be character, number or date formats. Banner uses DD-MON-YYYY display format for dates.
- Could you specify whether real-time or batch processing is required for updates between Banner and SEVIS, particularly in scenarios involving changes in student visa status or academic standing?
    - Response: Processing takes place between the CRM and SEVIS, not Banner and SEVIS

4. **RFP Reference: Manage international STUDENT SERVICES post admission through graduation and OPT**

- **Question:** Could you specify the key data points tracked from admission through to OPT, such as visa status updates, course completions, and OPT eligibility checks?
    - Response: Visa status updates, CPT eligibility, OPT eligibility and deadlines.

- How should these data points trigger automated alerts or updates in SEVIS within the CRM system?
    - Response: Data points should be retrieved using reporting functionality.
- Are there specific scenarios, like changes in enrollment status or academic probation, where real-time alerts are crucial for compliance?
    - Response: Yes, there should be an alert system available that in a situation where a student dropped below full-time enrollment, we would be informed.

5. **RFP Reference: Allow batch registration of students in SEVIS**

- **Question:** During which academic periods do you experience peak needs for batch processing of SEVIS registrations, such as at the start of semesters or during large intake seasons?
    - Response: Start of semesters - August & September; January & February
- What are the expected batch sizes during these periods, and how should the CRM handle error checking or data validation? For instance, are there common discrepancies that need automatic correction during batch uploads?
    - Response: current batches are less than 30 but several batches are processed during SEVIS registration. No known discrepancies during this process.

6. **RFP Reference: Support the Student and Scholar Experience**

- **Question:** Could you detail the specific events or status changes within the student lifecycle, such as visa status expiration or course completion, that must trigger automated email notifications?
    - Response: program end date within 90 days, visa and passport expiration would trigger email notifications
- Are there compliance-specific templates, like SEVIS updates or scholarship conditions, that these notifications need to adhere to?
    - Response: N/A

7. **RFP Reference: Communicate with admitted students and scholars directly and maintain a log of email communication**

- **Question:** What specific data privacy and security protocols, such as end-to-end encryption for emails or audit trails for access to communication logs, must be integrated into the CRM to comply with federal and state regulations?
    - Response: Industry standard security protocols should always be implemented for all storage and transmission of sensitive data. No sensitive data should ever be emailed.
- Could you also specify if there are particular compliance frameworks, such as GDPR for international students or HIPAA for health-related communications, that influence these requirements?
    - Response: N/A

8. **RFP Reference: Maintain digital copies of important documents for access by students, scholars, and staff**

- **Question:** Could you detail the types of documents that will be digitized within the CRM system, such as I-20 forms, admission letters, or scholarship agreements? What specific compliance measures are essential for their storage and access? For instance, are there requirements for encryption standards to protect sensitive information or specific retention policies that must be adhered to according to federal or state regulations?
    - Response: I-20 forms. We do not intend to use this CRM to maintain students' comprehensive record.

9. **RFP Reference: Streamline Office Processes (eliminate paper wherever feasible)**

- **Question:** Which particular forms within the university's processes, such as enrollment confirmations or student status change forms, are you planning to digitize in the CRM system? What specific validations or approvals are required for these forms? For instance, do some forms need sequential approvals from multiple departments, or are certain validations mandatory, like verifying student eligibility or enrollment status before processing
    - Response: CPT, Drop Below Full-time enrollment, I-20 Extension and OPT are processes we would like to digitize and need approval by advisors in other departments.

10. **RFP Reference: Provide the ability to create advanced, shareable reports and queries**

- **Question:** What are the essential types of custom reports CGLE needs, and can you describe the data aggregations or visual elements, such as dashboards or graphical representations, that are critical for operational and compliance monitoring?
    - Response: program end date within 90 days, visa and passport expiration among other basic reports that can be downloaded to excel format.
- Are there frequent needs for dynamic filtering or real-time data interaction within these reports?
    - Response: N/A

11. **RFP Reference: Provide restricted administrative access to records through a robust permissions system**

- **Question:** What specific roles within CGLE require differentiated access levels in the CRM? Could you elaborate on unique permissions for each role, such as which users can modify student visa statuses versus those who can only view them?

  - Response: DSOs and AROs will edit access. The PDSO will grant access as appropriate. Staff and faculty outside CGLE will have view only access and approval access when requested.
- Are there particular data elements, like financial information or personal student data, that require higher security measures?
  - Response: Financial data should be hidden to non CGLE staff and faculty.

12. **RFP Reference: Pull required data from Banner in order to issue I-20s and DS-2019s**

- **Question:** What key data points from Banner are necessary for the CRM to issue I-20s and DS-2019s accurately? For instance, could you identify any critical fields, such as student visa type, program end dates, or major changes, that have historically presented synchronization challenges?
  - Response: Basic demographic information, address, academic level, major, etc. A full list of data fields can be provided at the appropriate time.
- Are there specific formatting issues or discrepancies in data types that need to be addressed to ensure seamless data integration?
  - Response: Any discrepancies in data types will need to be addressed. It would be difficult to address formatting discrepancies prior to them being identified.

13. **RFP Reference: Integration with the university website**

- **Question:** What specific functionalities should the CRM facilitate through integration with the university website? Are there specific data interactions required, such as displaying real-time academic or visa status updates on the university portal?
  - Response:
- Should the CRM support features like alert notifications for deadlines or status changes directly on the student dashboard?
  - Response: Yes

14. **RFP Reference: Give international students access to an orientation module**

- **Question:** What types of interactive and multimedia components are envisioned for the orientation modules aimed at international students? For instance, should the modules include interactive quizzes, video tutorials, or virtual campus tours?
  - Response: This functionality is no longer requested.
- Are there particular accessibility standards, such as WCAG 2.1, or multilingual capabilities that these modules are required to support to ensure all students can effectively engage with the content?
  - Response: This functionality is no longer requested.

15. **RFP Reference: Manage SEVIS reporting and monitoring tasks**

- **Question:** Could you outline the specific SEVIS reporting tasks that the CRM needs to manage? To explain, are there particular types of data updates, such as changes in student visa status or course enrollments, that must trigger reports?
    - Response: The CRM should provide the capability to alert DSOs of when a student drops below full-time enrollment. Other data reporting may be requested based on functionality of CRM.
- What kind of audit trails or reporting logs should the system generate automatically to support compliance reviews and ensure data integrity?
    - Response: Daily report to ensure nightly integration has been completed.

16. **RFP Reference: Provide the ability to integrate with Cashnet or similar payment gateways**

- **Question:** When integrating with payment gateways such as Cashnet, what specific security protocols needs to be implemented by the CRM to ensure secure transactions? For example, besides PCI DSS compliance, are there additional security measures like tokenization or end-to-end encryption required?
    - Response: This functionality is no longer requested.
- How should the CRM handle data reconciliation between financial transactions and student accounts to ensure accuracy and auditability?
    - Response: This functionality is no longer requested.

17. **RFP Reference: Send automatic email reminders to students and scholars who need to complete specific tasks**

- **Question:** What specific tasks within the CRM system are set to trigger automatic email reminders to students and scholars? Are reminders sent for upcoming deadlines for course registrations, visa renewals, or financial aid applications?
    - Response: The current CRM is not used for this functionality but we would like to implement this functionality in the future.
- Moreover, if these tasks are not completed, are there automated escalation processes that need to be activated, such as additional reminders to other university staff or flagged follow-ups in the system?
    - Response: N/A

18. **RFP Reference: Pull student data from Banner on a nightly basis**

- **Question:** Could you specify the essential data integrity checks, such as validation rules for student IDs or program codes, required during nightly data pulls from Banner?
    - Response: When integrating data from Banner into the CRM, the system should use normal demographic matching to prevent creation of duplicate

    records. Furthermore, the system should allow for merging or corrections of discovered duplicate records.

- What types of synchronization logs does the university expect the CRM to generate to monitor and report on the accuracy and timeliness of these data updates? For instance, are there specific error logs or change reports that should be automatically produced to facilitate quick discrepancy resolution?
    - Response: This will be difficult to know until we understand how the CRM consumes data from the ERP system.
- What specific data validation or error handling protocols does the university expect the CRM to implement during nightly data pulls from Banner? Such as, are there critical fields such as student identification numbers or program codes that require cross-checking for discrepancies or duplications?
    - Response: It is expected each data field would have basic error handling protocols appropriate for the given data type.

19. **RFP Reference: Must support other international student requests such as Curricular Practical Training (CPT), Optional Practical Training (OPT), Extension of Stay**

- **Question:** What detailed workflows and document management features must the CRM incorporate to effectively handle processes related to CPT, OPT, and extensions of stay? For instance, what automated notifications are necessary to alert staff and students of pending deadlines or documentation requirements?
    - Response: The current CRM is not used for this functionality but we would like to implement this functionality in the future.
- Furthermore, how should the system track and archive related documentation to ensure compliance with federal regulations, and are there specific audit trails or access controls that need to be in place?
    - Response: Documents should be easily accessible and transferred to the university record retention system.

20. **RFP Reference: Allow students and scholars to upload their digital documents and attach them to their online records**

- **Question:** What specific document formats and metadata should the CRM automatically validate or extract upon upload, such as PDF compliance or extracting student ID numbers from document headers?
    - Response: Students should be limited to uploading digital documents related to requests such as CPT, OPT, etc. Students should not be allowed to upload any documents to their CRM record.

21. **RFP Reference: Integrate with the banner to ensure accurate information and to avoid duplicate records**

- **Question:** What specific algorithms or matching criteria should the CRM use to prevent data duplication during integration with Banner? For instance, should

the CRM utilize fuzzy matching for student names or exact matching for student identification numbers?
    - Response: When integrating data from Banner into the CRM, the system should use normal demographic matching to prevent creation of duplicate records. This includes both partial and exact matching. Furthermore, the system should allow for merging or corrections of discovered duplicate records.
- Are there known historical data issues, such as mismatches in course codes or discrepancies in student status, that the CRM needs to proactively identify and address during the data synchronization process?
    - Response: N/A

22. **RFP Reference: Include advising/notification features**

- **Question:** What specific advisory and notification features within the CRM are critical for maintaining students' lawful status under immigration regulations? Are there mandatory time-sensitive alerts for visa expiration or enrollment status changes that need automatic scheduling?
    - Response: An alert system should be available that in a situation where a student dropped below full-time enrollment, we would be informed quickly.

23. **RFP Reference: Communicate alerts quickly with students and scholars through email and text messaging**

- **Question:** Are there preferences for communication channels, such as email versus text messaging, based on the urgency or type of alert within the CRM system? For instance, should immediate alerts like class cancellations be sent via text, while reminders for document submissions be communicated through email?
    - Response: Text messaging functionality will not be requested. Email will be the primary communication method.
- Does the university have a preferred service provider or platform requirement for these communications to ensure system compatibility and reliability.
    - Response: N/A

24. In section 1.5 UCA indicates that proposals must include one original hard copy, three electronic copies on flash drives and one redacted flash drive copy. In an effort to limit environmental impact, is UCA willing to accept submissions via email if the files are clearly labeled?
    - Response: No

25. Related to Section 2, is there currently a solution in place that manages the requirements? If yes, what is the current solution?
    - Response: Terra Dotta

26. In Section 2, UCA indicates that SLATE CRM admissions software was chose as the recruitment and admissions software. Is this expectation that the solution for this RFP will integrate with SLATE CRM or replace SLATE CRM?

- Response: Neither, it should integrate with Banner

27. In Section 2 under heading "Requirements" UCA states "The vendor must provide training and assist UCA GGLE staff in the development and maintenance of the database..." Where does this "database" reside, or are you using database as a generic term to reference the solution that that vendor would provide?

- Response: Just generic in the sense of data in Banner

28. Related to Section 2, how many UCA staff members will need access to this solution?

- Response: 6

29. Related to Section 2, how many international students does UCA have that would be included in this solution?

- Response: 350

30. In Section 2 under the heading “Other Needed Capabilities” UCA references that the system should integrate with industry standard payment gateways. Can you provide further detail as to what payments are expected to be processed via a payment gateway as part of this project?

- Response: Cashnet

31. Is there a budget allocated for this project? If so, could you share the estimated budget?

- Response: Yes, No

32. In the spirit of sustainability, is UCA willing to accept an electronic final submission?

- Response: No

33. What are key metrics that you are tracking and are focused on improving throughout this project?

- Response: See RFP

34. How many users (faculty, staff, admin etc) will use/log in to the system?

- Response: 6

35. Please classify the number of users by persona/profile/ department. How many P/DSOs and A/ROs support your international students?

- Response: 1 PDSO, 3 DSO

36. How many international students attend yearly (approximately)?

- Response: 350

37. Where do you currently store the estimated fees used to populate the Forms I-20 and DS-2019?
   - Response: N/A

38. How do students access their Forms I-20 or DS-2019? Are they sent via email or accessed via student portal?
   - Response: Via email

39. How often do you receive students who are sponsored by foreign governments (or related entities) and how do you identify them for the purposes of I-20 estimated fees, etc.
   - Response: Rarely, there are no fees for I-20's

40. What is the breakdown of F-1 visa holders when compared to J visa holders?
   - Response: 90% F-1, 10% J

41. How do you currently identify and communicate with students who are at risk of jeopardizing their visa status? What platform does CGLE use for Student Success and retention currently?
   - Response: Banner, Terra Dotta, Email

42. Will the ISSS staff have access to the application? If not, how's the notification sent to them (via email, text etc.)?
   - Response: Yes, Email

43. Are your current state processes already documented, or do you require your current state to be mapped out in this solution?
   - Response: Yes, Yes

44. "Manage international STUDENT SERVICES post admission through graduation and OPT" could you please list all the student services that this application needs to deliver post admission?
   - Response: Listed in RFP

45. Do the students or any other staff member need access to a scheduling tool?
   - Response: No

46. How many communications (emails/SMS) might be sent to students each day/month?
   - Response: 80-120

47. Are there any other details you would like to provide in terms of what you desire during this project or as an outcome?
   - Response: N/A

48. What are your current challenges with data quality and your ability to gather data and drive insights?

- Response: Having staff to exploit the CRM fully

49. Please comment on the data quality. Do you have staff to export, clean and share the data with us?

- Response: No

50. Can you please share the data volumes that need to be migrated to the new solutions?

- Response: Number of Records 350-400: Number of tables: N/A: Number/Size of Attachments: N/A

51. Do you have a middleware that you want us to utilize for integrations?

- Response: N/A

52. Please list all the systems the application will integrate with, including Banner, Slate and SEVIS, and provide the following information for all of them:
1. Frequency of data exchange
2. Batch vs Real time
3. Ad-hoc vs Automated
4. How much data (approximate record volume, number of tables etc) will be exchanged.

- Response: Slate to Banner = Nightly, real time, automated: Banner to Terra Dotta = Nightly, real time, automated: Terra Dotta to SEVIS ad-hoc, Batch: 350-400 records

53. Do you currently have a change management strategy and team in place to support the major changes both staff and students will face?

- Response: No

54. Do you have enough staff/resources to define and deliver change management?

- Response: No

55. Do you have IT staff that can be trained to manage the implementation and support the end users after the implementation?

- Response: Yes