Payment Services Migration Project
Open Forum

UFA Project Management Office
March 2, 2021
• ScholarChip, the vendor that Rutgers used for multiple payment and refund services, discontinued support as of July 2020.

• A project team has been working to implement interim and long-term solutions to facilitate business continuity.

• The following services were impacted:
  – Tuition payment plans
  – Student electronic refunds (ACH)
  – Student payment processing (online term bill)
  – Departmental payment portals
<table>
<thead>
<tr>
<th>Service</th>
<th>Status</th>
<th>Vendor</th>
<th>Launch Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition Payment Plans</td>
<td><strong>Nelnet</strong> became long-term vendor for student tuition payment plans, starting with fall 2020 plans. Spring 2021 plans now active. Able to accept credit cards as tender for partial payment plans.</td>
<td>Nelnet Business Solutions</td>
<td>Jul. 21, 2020</td>
</tr>
<tr>
<td>Student Electronic Refunds (ACH)</td>
<td><strong>Nelnet</strong> became long-term vendor for student electronic refunds (ACH).</td>
<td>Nelnet Business Solutions</td>
<td>Nov. 30, 2020</td>
</tr>
<tr>
<td>Student Payment Processing via Online Term Bill (OTB)</td>
<td><strong>SchoolPay</strong> became interim vendor for student term bill payment process</td>
<td>SchoolPay (interim)</td>
<td>Jul. 23, 2020</td>
</tr>
<tr>
<td>Departmental Payment Portals</td>
<td><strong>SchoolPay</strong> became interim vendor for departmental payment processing portals and application payment interfaces (APIs)</td>
<td>SchoolPay (interim)</td>
<td>Jul. 23, 2020</td>
</tr>
</tbody>
</table>
• The university selected Nelnet Business Services as a long-term vendor for departmental and student account payment services that currently use SchoolPay.

• Payment integration with Nelnet offers several benefits, including:
  – Consistent user interface and support with other Nelnet applications
  – Integration with other projects, such as Customer Relationship Management (CRM) and Student Information System (SIS)
  – Support for third-party vendor integrations currently utilized at the university such as Xenegrade, Terra Dotta and Flywire
• The project team is working with Nelnet to map out the project plan and configure interfaces with Rutgers mainframe and Oracle Financial Cloud.

• SchoolPay is aware of the transition and will continue to support payment services in the interim. We have extended their contract to May 2022.

• Proposed Timeline:
  – Configure Oracle file feeds by April 2021
  – Phased migration of departments to Nelnet - April 2021 through August 2021
  – Migrate student term bill payments to Nelnet by June 2021
  – Complete migration of all department payments to the new platform by September 2021
What visual differences should users/payers expect with the change to Nelnet? Will the payment gateway page look different?

We will preserve the university branding and color scheme, though there may be some minor visual differences. Functionalities will be similar to the current state.
• We are working to determine the order in which we will migrate departments, based on transaction volume, scope, seasonal peaks, and user input.

• We will send a survey link to gather the following information:
  – Websites you use to collect payments
  – Desired month your department would prefer to migrate
  – Any third-party vendors you utilize as part of your payment processes

• We will schedule another open forum in the coming weeks to provide a vendor demonstration of the new payment application.
FREQUENTLY ASKED QUESTIONS
• Will we be using the same Application Programming Interface (API) as ScholarChip/SchoolPay?
  – Nelnet uses a different API. We will make documentation available to your technical teams for review.

• What will happen to the reporting/transaction history after the transition? How will we log in to view that data?
  – Transaction history will not be imported to Nelnet. You can continue to log in through SchoolPay until May 2022 to view transaction history. It is recommended you export any pertinent information for your own records before then.

• Refunds are requested up to one year from the time of payment. How will we proceed to submit refunds if the transaction was originally paid on the SchoolPay platform?
  – We are contracted with SchoolPay until May 2022. You will be able to continue processing refunds for SchoolPay transactions through their interface until then, after which refunds will be issued via check request.
Frequently Asked Questions

• Will the new vendor support refund directly to the original credit card or e-check used?
  – Admin Users with required permissions can find a transaction and refund a credit card transaction to the card used for the payment. Approach to ACH refunds is TBD.

• Will there be an interface to verify that fees are accurately credited to the correct student, as well as the ability to search the platform to verify individual student payments?
  – Yes, authorized administrators may run payment and reconciliation reports, as well as search transactions based on Student ID, confirmation number, name, etc.

• I had admin access in the SchoolPay payment portal to view reports, etc. Will I have the same access in the new system?
  – We have provided the user access list to Nelnet and are working on a strategy to import the permissions into the new system as seamlessly as possible. For some high-level permissions (i.e., administrator role, ability to create refunds, etc.) we may reach out to your department to confirm who should have access.
• I don’t currently use SchoolPay and would like to set up a new payment portal, or I would like to make changes to my existing payment portal. How do I go about doing so?
  – Onboarding will continue to be handled through Central Accounting. Please reach out to Tatiana Miller or Raina Patel.

• Will there be user and/or admin training available on use of the new system?
  – We will schedule webinars illustrating use of the new system. We will also make recorded materials and FAQs available for review.

• When will a test environment be made available?
  – The vendor UAT environment has been deployed. Test payment pages will be made available in the coming weeks as they are configured for the various departments.
ADDITIONAL RESOURCES:
https://uco.rutgers.edu/payment-services-migration

CONTACT US:
paymentproject@finance.rutgers.edu