

Student Financial Services
(Bursar's Office)
SACSCOC REPORT

Student Financial Services (Bursar's Office)

I. Advance Student Success

Goal Description:

Develop university resources and infrastructures that support the intellectual transformation of students.

RELATED ITEMS -----

RELATED ITEM LEVEL 1

Increase Visibility/Accessibility of the Bursar's Office

Performance Objective Description:

The Bursar's Office will provide increased opportunities for interaction with students and their parents beyond normal office operations.

RELATED ITEM LEVEL 2

Student Success

KPI Description:

- The Department will provide targeted communication to students through various communication channels to inform students of critical payment requirements.
- Department will report the percentage of students dropped for fall and spring semester first class day, twelfth class day, and twentieth class day drops.
- The Department will develop new brochures to distribute to students regarding services offered and payment options.

Results Description:

- Approximately five business days before each drop during the fall, spring and summer semesters, the Bursar’s Office used the sydrop report to review student accounts and provide messages to those not meeting payment requirements. Targeted text, email, and recorded phone calls were made leading up to each drop date.
- Drop percentages were reduced for each semesters payment due dates. A Payment Analysis was prepared for fall and spring showing the drop numbers by defined criteria and also the percentage of students dropped. Previous year’s information is provided on the Analysis for comparison. Need to attach payment analysis
- A new brochure that provides payment information, services offered, and more was developed and distributed at each Passport to Sam.

Attached Files

- [201680_Payment_Analysis](#)
- [Spring_2017_Payment_Analysis__01_11_17_](#)
- [brochureimportant_due_date_handout](#)

RELATED ITEM LEVEL 1

Reduce Financial Drops of Course Schedules

Performance Objective Description:

The Bursar’s Office will seek to support student retention and success by decreasing the number of students dropped from courses due to not meeting payment requirements.

RELATED ITEM LEVEL 2

Student Success

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II. Increase Efficiency Of University Operations

Goal Description:

Develop and deploy automated solutions that allow visibility into the departmental business needs.

RELATED ITEMS -----

RELATED ITEM LEVEL 1

Identify Third Party Solution (Automated Solutions)

Performance Objective Description:

The Bursar’s Office will identify a third party process that may be better supported by a 3rd party solution/provider.

RELATED ITEM LEVEL 2

Third Party Solutions

KPI Description:

- The Bursar’s Office will identify a collection process that may be better supported by a third party provider
- The Bursar’s Office will meet with a third party provider of the pre-collection process.

Results Description:

- From information gathered at conferences and other similar institutions it was determined that some universities use a third party provider to help in a pre-collection process to reduce amounts sent to collection/ number of students sent to collection • Department met with a provider to access the service they provide and the value of that service

RELATED ITEM LEVEL 1

Implement a Customer Service Tracking System (Develop Automated Solutions)

Performance Objective Description:

The Bursar’s Office will work with IT to design and implement a reporting system to evaluate customer service needs and will develop related KPIs.

RELATED ITEM LEVEL 2

Automating Processes

KPI Description:

- The Department will work with IT to develop a “check-in” system to monitor service needs
- Department will track patterns and needs of the student population based on data collected from check-in system.

Results Description:

- A check in system was developed face-to-face transactions that allows for tracking of services requested as well as which CSR performed those services and the length of time per service. This was previously a paper-based tracking completed by each CSR.
- Reporting from the check-in system is monitored and used to determine staffing needs and areas for staff improvement.

Attached Files

- [📄_Bursaroffice -2017-08-20-08-25-Workers totals](#)
- [📄_BursarsOffice-2017-08-13-08-19 workers](#)