

Who is Playing in my Sandbox?

Effects other departments can have on Student Accounts

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Texas Tech University
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Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session
- Please feel free to interject with questions or if you are having trouble hearing

Thank you for your cooperation!

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Introduction

- Several billing rules are built based on data managed by other departments such as Admissions, Registrar, Course Builders, Provost, Colleges, etc.
- We will provide examples of how TTU has established communication processes to ensure all affected depts. can stay in sync to ensure accurate billing for the student.

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What will this session do for you?

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- This session will identify several billing features that are maintained by other departments which could also be the case at your institution.
- We will show you how we have developed various coordinated efforts to help departments understand the impact to student bills.

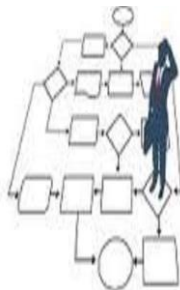
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What will this session do for you?

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- This session will help identify where other departments have an impact on billing operations.
- We will provide several possible solutions for organizing communication and for implementing processing improvements to improve billing accuracy.



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About Texas Tech University

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Over 33,000 Undergraduate, Graduate, and Law Students

- 150 Undergraduate Degree Programs
- 100 Master's Degree Programs
- 50 Doctoral Degree Programs

Part of the Texas Tech University System

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About Texas Tech University

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Reporting Lines:

- Admissions and Registrar report to Enrollment Management
- Academic Support and Colleges report to Provost
- Student Business Services reports to CFO

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Responsibilities:

- **Admissions**
 - Initial upload of student data
 - Residency verification
- **Colleges**
 - Build courses
 - Update student level, cohorts and degree programs
- **Academic Support**
 - Assists colleges with course builds
 - Manages facility requests and assignments

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Responsibilities:

- **Registrar**
 - Processes registration changes and withdrawals
 - Manages student records including SPAIDEN, SGASTDN, STVRATE, SOAHOLD, etc
 - Manages enrollment forms including SOATERM, SFAESTS, SFARSTS, etc
- **Student Business Services**
 - Processes exemptions, waivers and contracts
 - Manages billing, refunding and collections
 - Builds billing rate tables in Banner (SFARGFE)

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How we got here...

- AR Implementation: December 15, 2008
- Prior system
 - Built in house
 - Unconnected processing
 - Used for over 25 years
- Banner ERP
 - Less direct programming or modifications allowed
 - Integrated processing; modules codependent on same data
 - Users reluctant to change or uneducated about the new system



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How we got here...

- January 13th, 2009 New management arrived in SBS with little to no Banner Student knowledge
- The next few years were spent implementing in production...we are still learning!!!



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Who is playing in my sandbox?

- Departments across the institution have competing goals and often may not consider how their work affects others



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Who is playing in my sandbox?

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- **Admissions** – can update residency and student level
- **Registrar** – can update residency, student level, student site code, Social Security Number, registration and enrollment status, and fee assessment (student) rate codes

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Who is playing in my sandbox?

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- **Colleges** – can update student cohorts, student level, degree plans and build their courses and sections with campus location codes and billed SCH
- **Academic Support** – can update or build courses and sections with campus location codes and billed SCH

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And we learned...

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- Admissions feeds basic student information into Banner from external applications
 - Residency – TTU bases resident or non-resident tuition rates on this field from SGASTDN
 - Changes to residency codes, especially retroactive, can have a significant impact to a student's bill

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...the HARD way!

- Student Example –
 - Admissions generated a \$20,000 refund to a student by backdating a residency change for several terms
 - Subsequent review indicated we were not obligated to make the change retroactively
 - Admissions had no idea their change would result in a refund to the student



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What do we do now?

- Solution for a relatively uncommon issue:
 - Admissions now emails Student Business Services anytime a residency change is requested for prior terms to assess financial impact and ensure undesired consequences are avoided
 - To remain efficient, Admissions was instructed that they could alter residency status as long as it was only for the current term and prior to reporting dates
 - Since residency changes also impact reporting, Admissions includes our reporting group with these changes

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Multiple Owners of Same Data

- Both the colleges and Academic Support manage section build data:
 - SSASECT
- Both Academic Support and SBS manage course and section fee data:
 - SCADETL
 - SSADETL

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Multiple Owners of Same Data

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- Direct access to these forms in Banner prevented the tight controls necessary for accurate billing
- Resolution:
 - Two separate web applications for colleges to use to manage their course information
 - SBS Fee app was developed initially and then the Academic Support - Section Build app was developed
 - We hope to merge the two eventually

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Web Application Management

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Academic Support web application

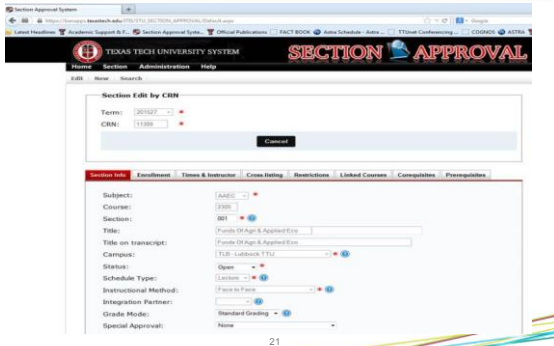
- Allows colleges to submit course and section parameters that are then loaded to Banner
- Academic Support can control:
 - What course and section parameters can be entered and what values can be used
 - When course and section parameters can be changed by the college

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Web Application Management

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Some processes are complex!

Some processes have **numerous** factors to consider:

- Multiple parties involved
- Numerous steps to complete a task
- Timing impact to the process flow
- Immediate tracking of status
- Communication across campus or cities
- Volume of data or even that dreaded PAPER!!



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Microsoft SharePoint Solution

- Increased communications and processing efficiency
- Improved security of data
- Ability to separate:
 - Information or communication functions
 - Processing functions



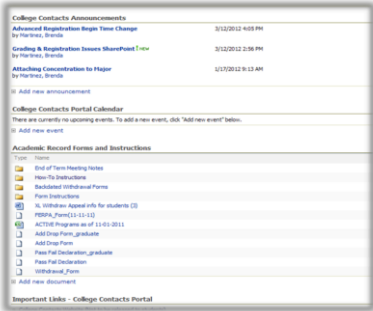
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Microsoft SharePoint Solution

- Free version available for download
- Enterprise version available for minimal cost
- Basic functionality does not require programmer expertise
- Can utilize various resource tools: announcements, calendars, document libraries, manage by groups

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Microsoft SharePoint Solution



"For every mountain, there is a miracle."
-Robert H. Schuller
"When faced with a challenge, look for a way, not a way out."
-David Weatherford

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Keys to making it work

- Define your process as narrowly as possible; Create tabs for specific areas or processes
- Provide information site with important links, FAQs, reminders and training info
- Identify key players and obtain buy-in by letting them test and provide input
- Keep training to their area of the process; don't tell them what they don't care or want to know
- Show users how it makes their life easier and could save them time and money

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Setting it up

- Establish security
 - Who needs access and at what levels
- Develop "List"
 - This is establishing the process steps
- Establish work flow (a SharePoint process)
 - SharePoint Designer makes this very easy
 - Set views: Pending, Flagged, Completed, etc.
 - Use to pull associated data from Banner; ex. Enter an ID and workflow will complete student name
- Develop reports and notifications

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Setting it up – the future...

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Enhance SharePoint processes by using Nintex

- User would see web application that is designed specifically to the process instead of SharePoint site
- Could embed approval link in an email so that user merely "clicks to approve" rather than logging into SharePoint
- Various areas could share developed workflows instead of creating them independently
- Potential for direct updates to Banner
- Offers better logging/tracking than direct entry to Banner forms

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Documents and Retention

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- Making the job more efficient
 - Attachments can be loaded and accessed easily
 - PDF documents can be automatically uploaded Xtender for document retention
 - If it is a busy processing time (beginning of a semester) then the user can flag the document for follow up to complete the upload process after things slow down again.
 - Keeps staff from scanning paper received, saving to documentation folders and then shredding documents

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Collateral Benefits

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- Eliminate paper



- Monitor productivity



"Just measuring your job performance..."

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- Track progress and set up alerts



- User can view status at any time

- Identify Training Opportunities

How do we all play together?

EDUCATE, EDUCATE, EDUCATE



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How do we all play together?



Communication is KEY

- Effective – Clear and Concise; In a form that will attract attention from the intended audience
- Efficient – Not a drain on personnel; Not Costly
- Timely – Affected parties receive the message at a time that is useful and relevant

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Summary

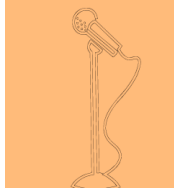
- Inter-department Communication Solutions:
 - Email
 - Web Application
 - Sharepoint
- Solution chosen depends upon:
 - Frequency of the issue
 - Risk of the issue causing greater issues
 - Time sensitivity of the issue
 - Legal implications

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Questions & Answers

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Thank You!

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