Student Business Services Performance Criterion

What are the main objectives of your unit and how do you measure success in achieving them? How do you review and evaluate your department's yearly performance?

1. The building, testing and implementing of tuition and fee rules each semester.
   To achieve success, Student Business Services (SBS) will work with the Budget Office to obtain the current rates approved by the Board of Trustees (BOT).
   SBS works with the different departments to ensure proper assessment of department and course specific fees.
   SBS builds the tuition and fee rules in a testing environment. In the testing environment all rates will be reviewed to ensure the rates are assessed correctly.
   If rates are not assessing correctly in the test environment SBS will investigate and implement solutions working with the proper department to make corrections as needed. After correction, the process will be retested.
   After successful in the testing environment, the tuition and fee rules will be transferred to the production environment. In the production environment the rules are reviewed again to ensure that all rates are assessing correctly.
   SBS measures success by the accurate and timely assessment of tuition and fees aligning with the BOT approved rates.

2. The processing of credit balances to student accounts.
   To achieve success, SBS reviews students' accounts for the proper disbursement of financial aid which may include Title IV, scholarships, third party and private payments. SBS will process student registration refunds on a daily basis, forwarding funds to selected refund preference which may include paper check, BankMobile or a paper check to parent in the event of PLUS.
   Success is measured by daily review of credit balance aging reports to verify refunds for credit balances are processed within the federally mandate Department of Education 14-day timeline.

3. Monitoring and collection of student account balances.
   To achieve success SBS will send out invoice which may include Ebill (Touchnet) and paper invoices on a monthly basis.
   The cashier will post payments that are received via the postal service, credit card payments or wire transfers.
   SBS will assist students in setting up payment agreements using email, telephone calls and face to face. SBS will work with the student and parents to find the appropriate payment solution.
   Review all accounts for compliance of payment agreements placing and removing holds and late fees.

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> Past due accounts are reviewed using aging reports. Accounts are reviewed every 30 days at which time holds, and late fees may be assessed. SBS will attempt to contact the student via email, telephone calls and letters.
> SBS will generate a letter to all students living on campus whom have not made payment or set up a payment plan. These letters are hand delivered to the student dorms with the assistance of the housing department.
> SBS will assign accounts to the collection agency upon completion of due diligence collection attempts including letters and telephone calls.
> SBS will monitor the collection agency accounts to ensure the balances coincide with the BANNER system.
> SBS will manually post payments from the collection agencies to the BANNER system. Removing holds when account is paid in full.
> SBS initiates a calling campaign every summer to contact freshman and transfer students to welcome student to Adams State University and answer any questions the students or parents may have. Staff will review account with student and assist with College Opportunity Fund (COF), explain outstanding requirements, loan processes, payment deadlines, payment options or any other concerns. SBS staff refer student to appropriate office for further review as needed. SBS follows up each call with an email providing contact and other requested information.
> Scheduling regular staff meetings to discuss alternative ways of reaching out to students, implementing processes that may improve or enhance existing processes. Implementing new processes and replacing outdated processes.
> SBS measures success by the amount of paid in full accounts, number of past due accounts, and accounts with active payment agreements. SBS keeps records of amounts and number of accounts assigned to collection agencies and monitors agency performances.

4. SBS generates 1098Ts, manages the Perkins Loan fund and reviews all registration, fee assessment and financial aid daily sessions.
   To achieve success SBS and Accounting department reviews and closes all cashiering sessions. Reviewing sessions for errors, mistakes or inappropriate transactions. SBS will contact proper departments to make corrections or report any inappropriate transactions to proper University officials.
   After review of federal guidelines, SBS will build 1098T tax rules, test and generate a file to be forwarded to the third-party servicer for processing. This process requires collaboration with Computing Services to ensure BANNER is updated and the correct file format is transmitted.
   The Perkins loan fund works with the Financial Aid department on the amount of funding available to students every year. SBS will invoice borrowers and assign accounts to collection agencies as necessary. SBS will also exit out the students once the student is no longer eligible for the Perkins loan.

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Success is measured by 1098T accuracy and meeting the federal regulation deadline.
Perkins loan is measured by maintaining an acceptable cohort rate.
Cashiering sessions are measured daily by reviewing sessions for account transactions, balancing individual sessions, and matching the deposits to BANNER.

In what ways does your unit relate to other units of the university, academic and non-academic?

SBS works closely with Financial Aid department to ensure proper aid is posted, contacting them if we see errors or have questions on student accounts. If a change in situation or circumstances are noticed on the student account SBS will alert the Financial Aid department for additional review. Having query access to financial aid forms enables SBS to answer many financial aid questions. This eliminates the need to transfer or send students to additional offices, providing greater customer service. We use email, google docs and the BANNER system to communicate.

When building tuition and fee rules SBS must be knowledgeable in campus codes, level, delivery methods, and programs. SBS works with admissions and records to ensure that students are coded, and rules are built at the correct level, type, and residency. If changes in procedures occur in admitting students, then the corresponding change for tuition and fee assessment must be made. Open communication is vital.

While the records department over sees the building of courses, SBS requires certain attributes and flags marked on courses built to ensure proper assessment of tuition and fees. SBS runs reports of all courses listed and provides a list to records to correct or update attributes.

SBS provides needed details codes and attributes to Extended Studies for course creation. SBS provides training as needed and advisement on assessment methods.

SBS creates and updates detail codes essential for assessment of tuition and fees. The Budget Office will communicate the correct accounting string for new or updated detail codes. SBS reviews these details codes for outstanding balances prior to updating and provides amounts to Budget Office for any journal entries to be made due to the change. SBS will update the accounting and follow through to make sure the codes are processing to the proper accounts.

SBS will work with Computing Services, to create, update, and turn on automatic CRONS to create and update GT Tuition cohorts, assess matriculation fees, athletic fees, process COF files, and assess fees daily.

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The cashier functions as the first line of customer service for SBS. Providing assistance with payments, payment plans, housing deposits, emergency loans, COF and refund preferences (BankMobile).
Cashier also provides assistance for resetting tokens, adding dollars to print accounts, transcript printing and Notary services.

The cashier works with departments across campus to make deposits i.e. club accounts, Guest Services, Housing, Print Shop, Theatre and Athletics. Cashier accepts payments for fees and fines such as Library late fees, parking tickets, art supply fee, testing center, fingerprinting, CPR training and fitness testing.

The cashier receipts in scholarship checks, forwarding receipts and documentation to the Financial Aid department for processing onto student account. Runs financial aid disbursement process mail, removes holds and prepares bank deposits.

The ASU Veterans Office and SBS work sharing information regarding Veterans Administration (VA) benefits. Communication is conducted through email, telephone calls and shared Google documents for students, amounts and chapter of VA benefit. When payments are received SBS verifies amount paid with amount certified verifying benefits do not exceed tuition and fee charges. SBS logs check number and check amounts notifying the ASU Veterans office of any discrepancies so additional funds or debt letters can be requested. VA debt letters will be processed and refund checks mailed to the VA as requested on the debt letter.

SBS initiates a calling campaign every summer to contact freshman and transfer students to welcome student to Adams State University and answer any questions the students or parents may have. Staff will review accounts with students and inform and assist with COF, explain outstanding requirements, loan processes, payment deadlines, payment options or any other concerns. SBS staff refers students to appropriate offices for further review as needed. SBS follows up each call with an email providing contact and needed information.

SBS invoices the College Access Network (CAN) for the COF, balancing amount paid on student accounts to amount invoiced. With the assistance of Computing Services uploads and imports files to and from CAN. SBS notifies controller of expected amounts for journal entries. Students are contacted to apply and authorize COF. SBS works with admissions, records, high school counselors, high school coordinator, and student to correct any errors. Working with Computing Services, SBS transfers files between ASU and CAN to insure payment and credit to student.

SBS reviews and processes request for third party information and statements, billing the third party, collecting payment, following up for missed payments, and making payment arrangements

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with students. Employee tuition and college service fee waivers are processed after receiving authorization from Human Resources.

Students with past due accounts are contacted through telephone calls, emails, and letters in order to receive payment or set up a payment plan. Staff will review account with student and establish special payment plans as needed. Past due accounts from prior semesters are sent final collection letters and telephone calls are place before assigning accounts to collection agencies.

Accounts at collections agencies are monitored for collection rates, payments, tax offset, and write off. SBS transfers accounts between agencies if no funds are collected in 12 months. Payments from collection agencies may be received via wire transfer or a paper check. Payments are receipted to the BANNER system manually. Accounts at collection agencies are monitored and balanced to BANNER. Accounts assigned to collection agencies are submitted to the State of Colorado Department of Revenue to be processed for tax offset. Tax offset requires collaboration with the ASU controller, Computing Services and the Department of Revenue. Payments received from tax offset are receipted to the BANNER system manually.

What resources do you need to improve your services to a superior level? How could the university help your unit do its job better?

BANNER training to better utilize the functions of the BANNER system is needed. There are features not functionally set up. Some examples are auto refunding, unapplication & reapplication of payments, holds, late fees, and unknown forms or processes that could provide assistance.

TouchNet Payment Plans or a similar solution would allow for payment plans to be set up online and automatic payments to be scheduled. This would improve service to students. Students currently need to first set up a plan by contacting SBS through telephone, email or face to face, then manually pay each payment. Automatic payments would not only reduce time spent on collecting payments but would also result in more revenue. Often scheduled payments are not made on time requiring additional contact by SBS.

TouchNet Market Place or similar solution would allow various departments to create an online payment portal for services such as, athletic camps, event tickets, testing fees, parking fees, art fees, and seminars. SBS has received requests from campus offices for ability to set up online stores to order products or services and receive payment. This product would allow ASU to provide these services and to have funds directly deposited into the correct accounts.

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Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission?

SBS does a wide range of tasks and much of it is manual processing such as refunding and establishing payment plans as well as the receipting in of payment from various offices. If there were automated processes such as online payment plans, automatic payment, extended payment options, or market place for various offices, then our resources would be better put to use in customer service. Online payment plans would give students, especially online students, ability to efficiently establish payment agreements and allow staff more opportunities to contact students that may need assistance and help them find solutions to paying their account and therefore assisting students to pursue their dreams and ambitions.