University of Louisiana at Lafayette

Detailed Assessment Report
2015-2016 Bursar
As of: 11/21/2016 01:36 PM CENTRAL
(Includes those Action Plans with Budget Amounts marked *One-Time, Recurring, No Request*.)

Mission / Purpose

To provide to our student body, courteous, efficient, and cost effective fee collection and financial aid disbursement procedures.

The University is dedicated to achieving excellence in undergraduate and graduate education. The University has been and will always be committed to diversity and integration. The agency goals will be advanced through this commitment and through instruction, research, and service.

Other Outcomes/Objectives, with Any Associations and Related Measures, Targets, Findings, and Action Plans

O/O 1: Student Payment Accessibility
As of 8/3/16, Students have the ability to pay all student assessments via the University Payment Gateway.

Related Measures

M 2: Development of Anticipated Financial Aid Worksheet
Development of an anticipated financial aid and scholarship calculation worksheet as part of the University's Online Payment Gateway.

This measure will also be addressed with the building and implementation process through the new ERP-Banner. Estimated time (2 Years)

As of 8/3/16, anticipated financial aid is automatically calculated on student's account. Tuition/Housing total charges appear on the student's account with financial aid subtracted to get a final balance due to ULL or refund due to student.

Source of Evidence: Administrative measure - other

Target:
build processes within two years and implement within 2 1/2 years through ERP-Banner.

####### Finding (2015-2016) - Target: Not Met
It has been determined that Financial Aid will have to develop a Financial Aid worksheet,

####### Related Action Plans (by Established cycle, then alpha):

####### Continued Development of Anticipated Financial Aid Worksheet
Continue to complete the process of transferring information into Banner ERP. To complete what is needed to go LIVE with Banner and to be mostly proficient with the process needed to be comfortable in using Banner ERP. To expand process of transfer to at least 70% complete. To train other office employees the basic knowledge to move through Banner comfortably.

As of 8/3/16 this action plan has been completed.

Established in Cycle: 2014-2015
Implementation Status: Finished
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Development of Anticipated Financial Aid Worksheet | **Outcome/Objective:** Student Payment Accessibility

Implementation Description: Continue to work with Banner employees to set up for transferring of information to begin the process of posting payments to students accounts - COMPLETE
Projected Completion Date: 08/2016
Responsible Person/Group: Christie Boutte' (Bursar)
Additional Resources: Completions of other departments portion in Banner system.

Bursar Office not involved with development of Financial Aid Worksheet

Financial Aid determines student's finances and records in Banner. The estimated financial aid appears on student's account for the Bursar's officer to collect charges less anticipated financial aid.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Development of Anticipated Financial Aid Worksheet | **Outcome/Objective:** Student Payment Accessibility

Financial Aid

Allow Banner to automatically calculate financial aid from Financial Aid's input information.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Development of Anticipated Financial Aid Worksheet | **Outcome/Objective:** Student Payment Accessibility

M 4: Determine all fees to be paid online and work with ERP team

Use existing data to gather information on all fees that can possibly be paid online or converted through Banner to pay online. This would include fees now labeled miscellaneous items. Work with ERP team to build processes for this to take place.

Source of Evidence: Existing data

Target:
All student fees programmed to be paid online.

Finding (2015-2016) - Target: Partially Met
Students have the ability to pay degree applications online. The other

miscellaneous fees are still a work in progress.

Related Action Plans (by Established cycle, then alpha):

Online payments of miscellaneous charges

Continue to identify miscellaneous charges; create codes; meet with ERP team to include in online payment process.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Determine all fees to be paid online and work with ERP team | **Outcome/Objective:** Student Payment Accessibility

Online payments of miscellaneous charges.

The Bursar's office and ERP are working on getting the majority of miscellaneous charges in Banner for the 2016-2017 cycle.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Determine all fees to be paid online and work with ERP team | **Outcome/Objective:** Student Payment Accessibility

Projected Completion Date: 12/2016

O/O 2: ERP-Banner (Collections)

Work with ERP implementation team to create and customize user friendly student portal and payment system, efficient debt notification and invoicing, and efficient and streamlined collections process for staff.

8/3/16 user-friendly student portal and payment system has been implemented.

Related Measures

M 5: Discussions with ERP team/Webinars

Attend meetings with ERP team to discuss Bursar operations (specifically for student collections and disbursement operations). Student collections, fee assessment, and collections are complete. ERP still discussing how refunds of credit cards; miscellaneous transactions; e-deposits; 1098T; BDM; etc. will be handled.

Source of Evidence: Administrative measure - other

Target:

Bursar staff will attend all meetings as scheduled by the ERP team pertaining to collections.

Finding (2015-2016) - Target: Met

Staff's attendance to ERP team meetings pertaining to collections made the transition from ISIS to Banner as seamless as possible.

Related Action Plans (by Established cycle, then alpha):

Banner TEST

Staff will be able to practice in Banner TEST (test student information,

nothing can harm production software) site before working in Banner PROD (production software).

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Discussions with ERP team/Webinars |
Outcome/Objective: ERP-Banner (Collections)

Continuing education of Banner all new proceedures.

Staff will continue to train in Test before going live in all new Banner procedures.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Discussions with ERP team/Webinars |
Outcome/Objective: ERP-Banner (Collections)

O/O 2: ERP-Banner (Disbursements)

Work with ERP program team on disbursement processes in order to create customized program before implementation.

Title IV and regular disbursement process through Banner/Touchnet is being utilized. Credit card disbursements are a work in progress.

Related Measures

M 5: Discussions with ERP team/Webinars

Attend meetings with ERP team to discuss Bursar operations (specifically for student collections and disbursement operations). Student collections, fee assessment, and collections are complete. ERP still discussing how refunds of credit cards; miscellaneous transactions; e-deposits; 1098T; BDM; etc. will be handled.

Source of Evidence: Administrative measure - other

Target:
Bursar staff will attend all meetings as scheduled by the ERP team pertaining to disbursements.

Finding (2015-2016) - Target: Met
Bursar staff attended all meetings as scheduled by the ERP team pertaining to disbursements. The meetings helped disbursements staff learn how to run reports and finalize disbursements in a timely manner.

O/O 3: Percentage increase of direct deposit usage

Provide more efficient and fiscally responsible disbursement of funds to students by promoting direct deposit and thereby reducing refund checks mailed out to students. Goal is approximately 75% usage of direct deposit.

Related Measures

M 3: Percentage increase of direct deposit usage

Establish and understand the % of direct deposit for excess balance refunds. Once this is established, we will create a measure to determine the percent increase.

Percentage figured with any given daily disbursement report. Not enough reports have been run to date to give a true percentage.

Source of Evidence: Activity volume

Target:
Establish baseline % in order to determine % increase in future cycles.

Finding (2015-2016) - Target: Not Reported This Cycle
This was not assessed this cycle. And we will determine baseline %s for the coming year.

Related Action Plans (by Established cycle, then alpha):

Continued Percentage Increase of Direct Deposit Usage

Marketing to send out another mass email encouraging students to submit banking information with the Direct Deposit form included with the email at mid-semester and before every semester ends.

Established in Cycle: 2014-2015
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Percentage increase of direct deposit usage | **Outcome/Objective:** Percentage increase of direct deposit usage

Implementation Description: Continue offering direct deposit through cashier windows. Provide information with Orientation office for new student to take advantage of Direct Deposit. Mass email all continuing students to take advantage to direct deposit. Leave information for direct deposit with other departments.
Responsible Person/Group: Disbursements Supervisor

O/O 4: Research and Documentation for Disbursements & Cashiers
To develop a more streamlined research and documentation process that will enable staff members in both the disbursement and the cashier section quicker access to documents for research and job duty purposes. This will save valuable time previously lost when searching for paper documents. Also, since our office space has been downsized to 1/3 of our previous office, this objective will allow staff to use the office space more efficiently. This will also provide our office with a more efficient paperless disbursement process.

CV sessions are now scanned which allows digital storage of all receipts, deposit slips, etc. This efficient storage of records allows more physical space in the office. The plan is to keep only the current and previous year physical files in storage and shred all older years.

Related Measures

M 6: Research and Documentation for Disbursements

- Disbursements office will receive only electronic check registers from data processing. All hard copy documents that are inactive or have been scanned will be shredded. Scanned documents and electronic copies of check registers will be kept in a folder for easy access on the shared file.
- Cashiers section of our office will scan all billing documents and Attorney General collections files. All files will be kept on the shared file for easy access

for research and documentation purposes. All hard copies will be shredded.
- Cashier's section will also save all Attorney General dispute documents, bank wire documents, peer transfer documents, etc. to shared file.

Source of Evidence: Administrative measure - other

Target:
Streamline/reduce hard copy documentation for all office personnel due to condensed office space.

Finding (2015-2016) - Target: Partially Met
Disbursements still receives paper check registers from data processing. The goal is to go completely digital as soon as possible. Cashiers' sessions are now scanned which allows digital storage of all receipts, deposit slips, etc. This efficient storage of records allows more physical space in the office. The plan is to keep only the current and previous year physical files in storage and shred all older years. All Attorney General dispute documents, bank wire documents, peer transfer documents, etc. are in a shared drive location.

Related Action Plans (by Established cycle, then alpha):

Continued Reasearch and Documentation for Disbursements
Eliminate hard copy documents and provide back up.

Established in Cycle: 2014-2015
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Research and Documentation for Disbursements | **Outcome/Objective:** Research and Documentation for Disbursements & Cashiers

Implementation Description: Disbursements: Scan all direct deposit information into a shared file for quick viewing. Down size refund copies to one semester of hard copies. Cashiers: Electronic files of Attorney General documents for easy access. Continue to download Attorney General files onto shared drive.
Responsible Person/Group: Disbursement Supervisor and Bursar.

O/O 5: Processing Web Payments and Attorney General collections
Provide quicker and more efficient way to balance online web payments and posting of payments from Attorney General collection, These processes will ensure quicker and more accurate postings of payments to student accounts, especially during payment and registration deadline weeks. Quicker crediting of student accounts will enhance student services.

Related Measures

M 7: Processing Web Payments and Attorney General collections

- Create report and spreadsheet that analyzes web payments and determines which ones did not post to student accounts.
- Create report and spreadsheet on payments collected by the Attorney General that will expedite posting of AG payments.

Source of Evidence: Administrative measure - other

Target:
Quicken web payment and Attorney General collections process.

Finding (2015-2016) - Target: <u>Met</u>
Processes have cut posting time down by 2 business days.

Finding (2015-2016) - Target: <u>Met</u>
Processes have cut posting time down by 2 business days.

Related Action Plans (by Established cycle, then alpha):

Division of recordings

AG reports/comments, charges, and payments will be split amongst three staff to minimize time to finish monthly reports, and postings.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Processing Web Payments and Attorney General collections | **Outcome/Objective:** Processing Web Payments and Attorney General collections

O/O 6: Personnel Training
Create and develop a multifunctional office where all staff is familiar with office procedures and tasks in order to better serve the students.

Related Measures

M 8: Personnel Training

- Cross training for both cashier and disbursement office personnel.
- Team Work - motivational training.

Have begun staff training PowerPoint presentations.

Source of Evidence: Administrative measure - other

Target:
Train all office personnel to be able to work all facets of both cashier and disbursement offices.

Finding (2015-2016) - Target: <u>Not Met</u>

Unfortunately, personnel cannot handle both cashier and disbursement duties at the same time.

Related Action Plans (by Established cycle, then alpha):

Continued Personnel Training

Cross-trained employees to be able to cover any absent employee responsibilities without hesitation.

Established in Cycle: 2014-2015
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Personnel Training | **Outcome/Objective:** Personnel Training

Implementation Description: New employees will learn all aspects of office work. Some work in generalized information only and some work

in completed knowledge. Employees will learn to work as a team to provide "Customer Service" to all students by learning departments locations on and off campus. Employees will learn the functions of other departments in order to direct students to their proper destination. Progress is ongoing.

Responsible Person/Group: Cashier/Disbursement office

Powerpoint presentations for new staff

PowerPoints and manuals will be created for new staff to review before training begins. This will be more efficient than trying to explain everything one on one when the person has no idea of the scope of work.

Established in Cycle: 2015-2016
Implementation Status: Planned
Priority: High

Relationships (Measure | Outcome/Objective):
Measure: Personnel Training | **Outcome/Objective:** Personnel Training

Analysis Questions and Analysis Answers

How were assessment results shared and evaluated within the unit?

Assessment results were discussed by all staff with each commenting how Banner Test helped to practice charges, payments, notes, etc. before "going LIVE".

Identify which action plans [created in prior cycle(s)] were implemented in this current cycle. For each of these implemented plans, were there any measurable or perceivable effects? How, if at all, did the findings appear to be affected by the implemented action plan?

Continued Percentage Increase of Direct Deposit Usage: The marketing department mass emailed students to create direct deposit.

Continued Personnel Training: cross training has begun

Continued Research and Documentation for Disbursements:

Increase direct deposit through ULINK portal and web information: The Bursar website (bursar.louisiana.edu) has a Direct Deposit Form students can download and fill out. This form is then either brought in to the Bursar's office along with a voided check or a typed bank direct deposit letter, or emailed to bursar@louisiana.edu.

Degree applications: Degree applications are now filled out and paid online. Students can still go to Bursar's office if they are submitting the form late and it is no longer available online.

What has the unit learned from the current assessment cycle? What is working well, and what is working less well in achieving desired outcomes?

Cross training is working well so the office can run smoothly and efficiently when a staff member is not at work.

Direct deposit forms have been mailed with refunds to encourage students to submit direct deposit forms/paperwork. This has worked well and has cut down the number of paper checks mailed.

The online payment plan has not worked as smoothly as expected due to recalculations.
Tweaking of the program is ongoing.