MEMORANDUM

DATE: February 6, 2013

TO: Pat Pitney, Vice Chancellor Administrative Services
    Mike Sfraga, Vice Chancellor University & Student Advancement
    Pete Pinney, Interim Vice Chancellor Rural & Comm. Development
    Michele Stalder, Dean Community & Technical College

THROUGH: Raaj Kurapati, AVC Financial Services
          Kris Racina, AVC University & Student Advancement

FROM: Julie Larweth, Director
      Office of Management & Budget

RE: Student Processes Workshop Recap & Improvements to Explore Further

Please allow this memo to serve as a recap of the Student Processes Workshop that occurred on November 8, 2012. This workshop was the first time many Fairbanks and Rural located student advisors, administrators, and technicians have had the chance to meet each other, and collaborate to make suggestions for improving student workflow processes. This session was facilitated by Dave Read and Julie Larweth, members of the Process Improvement & Training team (PIT Crew) at UAF. Based on feedback from the session, participants found it useful to have an opportunity for this interaction and may be looking to find more ways to keep the lines of communication open in the future.

As part of discussion, here are areas where participants identified some processes currently work very well as compared to areas that may be candidates for improvement. Participants ranked areas of highest priority, as such, items are listed by order of importance to the group.

<table>
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<tr>
<th>Areas That Work Well</th>
<th>Areas That May Be Candidates For Improvement</th>
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<tbody>
<tr>
<td>Highest Priority Areas (in order of importance)</td>
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<tr>
<td>• Direct charging CRCD bookstore to student accounts</td>
<td>• Assessment of late fees is inconsistently applied and communication issues exist</td>
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<td>• Promissory notes – these can also be better communicated and expanded</td>
<td>• Changes are not communicated to all campuses; CRCD perceives rural student needs may be under-represented at large “policy” type meetings</td>
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<td>• One on one support to students in order to be sensitive to their needs</td>
<td>• Number of deadlines and fees are difficult to track and manage</td>
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<td>• Notification for students of past due payments prior to collections</td>
<td>• Student email accounts and access causes unnecessary delays</td>
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<td>• Drop for non-payment reduces PFD garnishment</td>
<td>• Wait list management practices are inconsistent</td>
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<td>• One stop shop for Financial Aid, Registrar, Advising</td>
<td>• Financial Aid is a very manual process that is also very often delayed; makes business payment workflows more difficult</td>
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<td>• RSS Services, specifically potlucks and student advisors to build personal relationships</td>
<td>• Staff and advisor training is needed</td>
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<td>• CRCD 1% or 3% discretionary student need based aid pool availability</td>
<td>• There are multiple offices for Housing, ID Cards, Financial Aid (not one stop)</td>
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<td>• Kiosks in the Signers’ Hall lobby – this can be expanded</td>
<td>• Fairbanks students are unable to charge education costs directly to student accounts for books/fees, registration, etc. The rural bookstore has this ability and it provides some business flexibility with student payments.</td>
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<td>• Can take the Accu-placer test online</td>
<td>• Last minute registration and add/drop procedures cause difficulty</td>
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<td>• Cultural training for faculty and student advising</td>
<td>• UAF website course finder, UAOnline course finder and DE Gateway are three similar systems that create student confusion</td>
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Other areas listed that work well…  
- UAOnline for student registration specifically  
- Agency bills moved off of student accounts  
- Online payment options  
- School district and Native corporation involvement  
- Cross training of staff

Other areas listed for improvement…  
- CRN’s are created only by 1 person, lack of backup or additional authority to do so  
- CTC and e-learning are subject to fees that may not be utilized at CTC  
- Refund process is manual and often late  
- PFD garnishment  
- Student ID cards – rural students want to use them  
- Military student process inconsistency  
- Audio class dial in information (#s) are not published with course information  
- Tuition waivers are manual causing entry delay  
- Drop for non-payment

Beyond this extensive list, participants also noted use of systems and services that may be available to some campuses, but not all. If given the opportunity, several campuses would like to engage in use of these systems or services. Participants stressed the need for greater consistency in student services, regardless of campus location. Some of these items include:

- **Direct charges to student accounts via the UAF Bookstore**
  - CRCD students can direct charge to student accounts via the CRCD Bookstore and Business Offices; currently Fairbanks is unable to do this. This creates delays at Fairbanks for book orders and late fees. There is a desire to put charges on student accounts as not all students have credit cards available to them. This will speed up the book order and fee payment processes (while students wait for Financial Aid) and allows them another option for timely payment.

- **Use of Polar Express (student ID) cards**
  - Currently Polar Express may only accept original signatures for application forms which results in several campuses not getting student ID cards consistently or at all. This additional process step and delay in service to the students results in many rural students feeling less connected to student life when they elect not to get an ID card. This also makes use of Bear Bucks difficult and student account charges cannot be utilized in this way. Participants recommend exploring a way to enable an online application for Polar Express cards for better access to rural students.

- **Use of OnBase document management systems**
  - In order for advisors, staff and faculty to be better informed about a student records and payments, rural campuses would like access to this system. Currently Kuskokwim, Bristol Bay, Interior Aleutians, CTC and Fairbanks are using OnBase. Nome currently does not, but shares with Fairbanks as this technology expands.

- **Shopping cart registration, automated wait list, and payment technology**
  - Currently student wait lists and add/drop processes are clunky and manual due to a lack of improved online “shopping cart” style technology. Students have a hard time seeing if they drop a class, that any student payments are also removed from the system. When a student drops a course, but a payment is not removed, students may be charged late fees for a course they have never attended.

Additionally, participants documented several areas to explore further in order to improve UAF overall service to students. These recommendations can be broken into categories, as follows: **Student Administration and Financial Aid, Technology, and Communication.**
Student Administration Recommendations
It is important to note, rural students rely on student aid and scholarships heavily. Many of the items discussed in this section refer to the manual process of waiting for and/or receiving confirmation of student aid.

Financial Aid representatives were not in attendance at this workshop and the Facilitators recommend these groups work through a similar session in the future to explore the alignment between these critical offices and processes.

1) Expand the Promissory Note options in order to verify student aid is coming, this helps mitigate the delays in Financial Aid which is currently a significant problem.

2) Provide flexibility of late fees and drop for non-payment; allow campus discretion (with appropriate controls) in order to process late fees – this includes flexible deadlines for late start courses. There is also a question regarding the ability to code late start courses differently in order to prevent the assessment of fees for these courses.

3) Financial Aid check entry is currently manual; performing this disbursement faster and earlier in the process may alleviate delays or student late fees.

4) Develop a check list or “cheat sheet” for rural campus business officers for use when a campus knows the student’s aid is coming; the list may include a “how to” guide for use of the Promissory Note, student proof of aid (from the agency on letterhead showing aid is coming), entry of a student into Banner to allow for timely registration, options for deferred payment plans, etc. This check list can clarify when to use each method to assist the student and will increase consistency between campuses.

5) Training sessions are needed in several areas, specifically contract classes for academic service agents, agency billing, and withdraws.

6) Several ideas were noted for improving the One Stop concept. These include:
   a) move Parking Decals to the Business Office,
   b) allow for online payments for day permits for parking,
   c) unlink the student meal plan and the student housing payments (as these do not always apply together),
   d) renew housing contracts by semester (not by academic year), and
   e) allow for student withdrawals in multiple locations (for example dining plan/housing plan or total withdraw/semester withdraw)

Technology Improvement Recommendations
Several technology improvements were noted by the participants; however, the main concern centered on email difficulty, which contributes to existing difficulties in communicating effectively with students.

1) Student email is assigned; however, no notification mechanism exists. As this may not be a preferred email address, it may not work for non-degree or non-traditional students without advising or other in-person contact. Allowing a choice for preferred email is also a desire.

2) If a student is waitlisted, they cannot get access to email. Some faculty are also not aware that they manage wait lists (manually). This creates additional delays for student access to accounts.

3) Clarify the message delivered via email with the 3XXXXXXXX number, UAOnline pin and email address. These are currently separate (and confusing) messages.
4) Improve ELMO features/functions; this is confusing to non-degree seeking students.

5) Develop a common point for communications online. When students register in UAOnline, consider using a page here to communicate registration changes, deadlines, etc. Currently multiple websites are used and information is not always aligned.

6) UAOnline can be improved, and is noted as not being very intuitive for students. Participants found it to be great for finding courses, however, needs improvement for making partial payments vs. total payments (for example).

7) Clean-up the lists.alaska.edu for mass communication.

**Communication Improvement Recommendations**

Improvements in communication resulted in feedback in several areas. Significantly most participants noted the feeling of “not being included” in policy-type meetings for decisions regarding student business process change, and expressed a desire to be represented more in discussions of this nature. Additionally, participants expressed a disconnect between student advisors and faculty advisors where wait list practices and payment plan options are concerned.

1) Improve communication of updates, specifically in regard to waitlist practices. UAOnline notifies students of waitlist deadlines; however there is limited or no notification when a student is moved off of the waitlist. Automating this process may help better communicate these changes with students.

2) Improve communication between the Registrar’s Office, student advisors, and CRCD when practices are changed. For example, the waitlist practice was changed from 36 to 48 hours; however not all groups had been informed of this.

3) Include CRCD representatives in the Fall Opening administrative meeting; currently this appears to be most heavily attended by Fairbanks, Statewide, Anchorage and Juneau participants. Include CRCD and/or rural user groups in planning meetings for improved stakeholder feedback prior to policy or business process changes.

4) Faculty advisors typically do not know a student’s payment detail as part of their academic record; this creates confusion for the student if payments do not match an academic plan/course load, etc. Finding ways to reduce this knowledge gap may allow for better informed student advisors (staff and faculty) and improved student payment processes. Advisor training may help in this and other areas.

All participants shared a desire to have workshops similar to this in the future and were excited to connect and discuss ways to improve service to students. We hope several ideas for improvement were generated from this group and we look forward to progress in this area.

Cc: Dave Read and PIT Crew Members, Student Workshop Participants