**SUNY Potsdam**  
**Administrative Unit Assessment Plan**

**Administrative Unit:**

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**Mission Statement:** The mission of the Office of Student Accounts is to efficiently enable and assist students to meet financial obligations, with a focus on financial integrity and accountability and to professionally serve the financial needs of SUNY Potsdam students by accurately disbursing and collecting student funds, administering financial programs of the college in compliance with state and federal government regulations, and respond to student and parent inquiries about these financial issues in a helpful, informed and courteous manner.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Desired Outcomes/Objectives</th>
<th>Assessment Methods and Targets</th>
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</table>
| 1. Maximize Potential Resources            | A. Right-size the office—ideally, obtain permission to hire a professional staff employee to serve the mission.  
B. Decrease turn-around time on significant campus/office responsibilities and obligations  
C. Ensure compliance with state and federal entities  
D. Increase staff morale | A. Review current size staff ability to fully carry out the mission of the college and the office; discuss with VP of Business Affairs.  
B. Review relevant sections of the Student Satisfaction Survey results, as they pertain to timelines.  
C. Review state and federal guidelines and policies.  
D. Informally poll office staff on the work environment. |
| 2. Improve Customer Service                | A. Train staff on how to respond and manage pertinent issues including diversity and student & parent inquiries in a significant way  
B. Train staff on phone and general customer service etiquette | A. Review student data from the New Student Transitions Survey and Student Satisfaction Survey results  
B. Collection and Analysis of feedback from office email account inquires |
| 3. Improve Collection of Funds             | A. Ensure timely payments on student accounts  
B. Ensure cash collection site deliveries are processed in a timely manner | A. Review and Analyze Billing and PAG processes  
B. Communications with cash collection sites |