

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

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PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their previous assessment work and reports and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: PRIOR YEAR ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is following up on [prior year assessment plans and reports](#). Review your prior year plan and report and select one of the desired goals and outcomes to comment on any changes or improvements resulting from actions taken.

Prior Year Assessment Plan – Desired Goal and Outcome(s)

Copy/Paste or enter the goals and outcomes from your prior plan that you wish to highlight and summarize. Also list any relevant results data and planned actions that may have been previously listed.

Goal: Provide accurate, accessible, and secure billing information to students, families, and the campus community

Objective: Utilize web-based technology to encourage self-service billing activity and Implement communication strategies that clearly present billing information and procedures

Target: 100% timely billing for open balance monthly bills

Result: Target met; all monthly bills released on the 16th of each month

Based on the outcomes, collected data/results, and planned actions, please describe what specific actions were taken and the resulting impact, if any.
Student Accounts will continue using existing billing practices

SECTION 2: ADDITIONAL ASSESSMENT HIGHLIGHTS (optional)

Assessment activity can take place that is not directly tied to previously submitted plans and reports. Please use this space to share any assessment success stories from this past year. What did you assess and how? What were the results? What did you learn from it and do as a result?

Percentage of unpaid bills declined slightly in 2122 to 19.5% unpaid, compared to 2021 which was 20%.

Phone volume inquiries related to confusion surrounding e-bill Summary balance compared to activity details balance indicates training on this component of our billing practices is lacking. As a result, the following steps were taken:

- Video tutorial 'Navigating Your Bill' was revised and now includes a highlight about the difference (deferred aid) between these two numbers
- A global message was added to the ebill dashboard with this information