

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: Student Accounts

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Assessment Year: 2022-2023

PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, 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: ASSESSMENT PLAN FOLLOW-UP

Selected Goal

Maximize e-commerce software use and capabilities to improve cash collection efficiencies and increase end-user convenience.

Desired Outcomes/Objectives

A: Student Accounts will make instructional content available to students via the website, and One Stop personnel via Student Administrative Services activities, to encourage awareness and the use of our ebill and e-commerce platforms.

B: Student Accounts will create an Online Transact storefront for all new initiatives requiring payment collections, whenever possible.

Related Targets/Measures

Ai Method: Review instructional content available annually.

Ai Target: Prior to fall orientation sessions beginning.

Aii Method: Review method of payment types used on student accounts annually using Banner data extracts.

Aii Target: 90% use of e-commerce payments (ACH or debit/credit card).

B Method: Annual review of payment collection requests.

B Target: 100% use of e-commerce solution for any new initiatives.

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

Ai. All department webpages were reviewed in the month of June in preparation for our first-time students. Collaboration with College Communications is on-going at this time to make necessary edits. Additionally, a mailing was sent the week of July 17, 2023 to new students to introduce the following e-commerce solutions and ways to manage their student account:

- Billing Information page
- One Stop Bookmark
- Insert from Orientation
- Payment Plans Info. Slip
- Grad Guard Insurance Info. Slip
- BMTX Refund Brochure

Aii. For fiscal year 22-23, the period of July 1, 2022 through June 30, 2023, 91% of student account payments were processed electronically. This is a two percent increase from the 2122 fiscal year, and a three percent increase from 2021 when electronic payments represented 88% of student accounts payments. *Note, this data does not include disbursed financial aid payments, or payments toward other revenue generating initiatives on campus.

Payments by type for the 2022-2023 fiscal year:

| | |
|---------------|------|
| PAY1- eBill | 5451 |
| PAY2-Check | 614 |
| PAY3-Cash | 18 |
| PAY4-ACH | 1244 |
| FWPY-ACH | 31 |
| PAY5- | |
| International | 10 |
| FWUS-ACH | 22 |
| ELV3 | 5 |

B. The Campus Life Facilities Rental Coordinator requested an online payment be processed in March 2023. This resulted in the creation of a Transact online storefront specific to facility rental invoicing. The storefront is integrated with Banner and automatically posts online payments to the departments account.

While we achieved our 100% target for new initiatives, we did experience some change with returning programs:

In 2020 our Crane Youth Music (CYM) Summer program transitioned to a new registration platform, Camp Docs. Due to the pandemic, Student Accounts did not see any money exchanged for this program between 2020-2022. For the Summer 2023 season, CYM continued to utilized Camp Docs due to a contractual agreement with the company.

During the 2022 camp season, our Creative Arts Camp utilized a foundation ticketing platform to collect camp registrations. When their receivables were sent to Student Accounts in the fall of 2022, this camp was asked to begin using Transact instead for future camp programs. Because Camp Docs offers management of required camp forms, our Creative Arts Camp instead opted to utilize their service over Transact. While the use of Camp Docs veers away from using the Transact e-commerce solution for collecting money, the benefits Camp Docs provide to these programs outweighs the exclusive use of Transact by the campus. The collaboration with Camp Docs meets various administrative needs for both summer programs and offers a software product specific to the type of program being offered. The platform reduces an administrative burden to the campus and serves the needs of parents and campers in a much more specific way than Transact is designed for.

Rather than processing incoming funds from Camp Docs via check, Student Accounts worked with camp personnel to establish an ACH direct deposit for these third-party receivables. This is consistent with other departments utilizing third-party services with built in e-commerce features. While the use of Camp Docs requires Student Accounts manually sort camp transactions and enter ACH data (because Camp Docs is not integrated with our campus software in the same way Transact is), the ACH electronic funds transfer for these specific receivables achieves a reasonable balance for the College.

The use of Camp Docs is an example of when it is appropriate to be flexible with our approach to cash collections and how a 100% target for all new initiatives to use Transact may not be appropriate in the future.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

Student Accounts will continue to promote and encourage the use of our e-commerce solutions whenever possible and will continue to explore new and efficient ways to share this information with students and families. Additionally, the volume of in-person payments for student accounts suggests the campus may want to consider ending the practice of accepting cash payments in our One Stop. This data will be presented to senior leadership to consider moving forward.

SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY

This year we are working on changes to our business practices surrounding the 1098T tax reporting as a result of shared experiences and data. 1098T reporting is very confusing for students, families, and Certified Public Accountants. As a result, leading up to the 1098T tax season, the Assistant Director of Student Accounts collaborated with our Center for Creative Instruction to recreate a 1098T instructional video resource that had previously been in a format we could no longer use. This video has been viewed over 2,000 times since December 2022, while other Student Accounts video tutorials posted have all been viewed less than 260 times each. Although we do not have a specific phone prompt requesting 1098T support, we know anecdotally our One Stop call volume increases with 1098T inquires around tax season. Many of these calls are escalated to the Student Accounts Director or Assistant Director for further explanation.

Having learned in a SICAS Functional Area User Group Meeting for Accounts Receivables and Finance professionals in March 2023 that other campuses delayed their spring billing dates for ease of 1098T reporting, our campus explored implementing this practice as well. Through discussion among student accounts, everyone agreed avoiding next tax year billing in the current tax year reporting will ease the confusion surrounding this mandatory tax statement.

In May 2023, a proposal was submitted to the VP of Enrollment to permanently adjust the release date for spring semester bills to the first week in January, approximately two weeks later than the typical timeline. The proposal was approved in June 2023 and the new business practice will be implement during January 2024 for the Spring 2024 semester. We anticipate this small shift in billing will have a big impact on student satisfaction and customer service efforts related to 1098T reporting.