

**SUNY Potsdam  
Administrative Unit Assessment Plan**

**Administrative Unit: Student Administrative Services**

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**Mission Statement:** To support prospective, current, and former students in achieving their educational goals by providing timely, respectful, and accurate assistance concerning financial aid, student accounts, registration and academic records.

<b>Goals</b>	<b>Desired Outcomes/Objectives</b>	<b>Assessment Methods and Targets/Measures</b>
Provide accurate, accessible, and secure billing information to students, families, and the campus community	<ul style="list-style-type: none"> <li>• Collaborate with campus offices applying charges to promote accurate and timely bills</li> <li>• Utilize web-based technology to encourage self-service billing activity</li> <li>• Implement communication strategies that clearly present billing information and procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Comparison to National Association of College and University Business Officer (NACUBO) Student Financial Services Benchmarking Report</li> <li>• Percentage of Students with Unpaid Balances,</li> <li>• Comparison to PCI Compliance benchmarks</li> </ul>
Disburse Federal, State, and local financial aid in compliance with regulatory requirements	<ul style="list-style-type: none"> <li>• Utilize electronic tools to execute disbursement and cash management activity according to Federal, State, and local requirements</li> <li>• Collaborate with financial aid to provide accurate, timely refunds to students through multiple delivery channels</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Review</li> </ul>

	<ul style="list-style-type: none"> <li>Effectively manage deferrals and aid programs that target specific student populations</li> </ul>	
Provide high quality customer service as needed through personal, phone, and e-mail interactions.	<ul style="list-style-type: none"> <li>Provide courteous, accurate, and timely responses to all customers</li> <li>Maximize staff skills by providing on-going training and resources</li> <li>Utilize web-based tools to improve customer service</li> <li>Implement Customer service Response Survey</li> </ul>	<ul style="list-style-type: none"> <li>Survey to be live for all those who contact with Student Administrative Services</li> <li>Office email reply rates</li> <li>TeamQ analytics</li> <li>Navigate analytics</li> </ul>
Improve undergraduate application processes	<ul style="list-style-type: none"> <li>More efficient graduation processing</li> <li>Less redundant applications for degree</li> <li>Clear directives for students</li> <li>Cohesiveness with Bookstore cap/gown ordering</li> </ul>	<ul style="list-style-type: none"> <li>Explore efficiencies including the Banner Self-Service Graduation Application</li> <li>Review current 100 credit hour threshold for graduation</li> <li>Implement best practices based on research</li> </ul>
Increase outreach for FAFSA Completion	<ul style="list-style-type: none"> <li>More timely completion of financial aid packaging</li> <li>More outstanding requirement triggers prior to the start of the term for students to address</li> </ul>	<ul style="list-style-type: none"> <li>Annual comparison review</li> </ul>