SUNY Potsdam
Administrative Unit
Assessment Plan

Administrative Unit: Student Accounts   Unit Contact Name: Beth Todd   Date: 12/1/22

Phone: x4828   Email Address: toddba   Assessment Cycle: 22-26

PURPOSE
Administrative Assessment is an ongoing process that allows a unit to evaluate and – where necessary – improve its programs, services and operations. Assessment is a systematic approach to demonstrate continuous improvement in programs, services and operations. This template is to be used when creating your assessment plan. Assessment plans should be measurable, meaningful and manageable.

UNIT 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.

GOAL #1
Reminder: Generally speaking, goals should be grounded in the mission of the unit, be broad, and linked to the overall institutional priorities and goals. They should focus on strengthening and improving critical functions, services and processes and reflect the most important/urgent priorities of the unit.

Facilitate timely and transparent billing practices to support efficient cash flow to the campus.

| **GOAL #1 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?** (Select all that apply)

 ☐ Retention and Enrollment
 ☒ Financial Stability and Analysis
 ☐ Academic Programs and Planning
 ☐ Strengthening Community Connections
 ☐ Diversity, Equity, Inclusion, & Belonging | **Briefly describe the link between goal #1 and the institutional priority area(s) selected.**

 The billing process involves collaboration with various departments on campus. Timely and transparent billing allows for predictable and consistent cashflow to the campus, supporting campus departments operating on cash by increasing their access to incoming funds. Timely and transparent billing also allows students the opportunity to meet their financial obligations. |

GOAL #1 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART… Specific, Measurable, Achievable, Relevant, Time-bound

1A. Communicate with stakeholders at least 30-days prior to planned go-live date for each billing cycle.
2B. The student accounts office will release bills between the 16th-20th of each month.

GOAL #1 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

1A. Method: Review of dates of communication dates compared to determined go-live date.
2A. Target: At least 30 days prior to each selected go-live date.

2B. Review billing dates to track monthly progress
2B. Target: 100% on-time billing

GOAL #2

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

GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☐ Retention and Enrollment ☒ Financial Stability and Analysis ☐ Academic Programs and Planning ☐ Strengthening Community Connections ☐ Diversity, Equity, Inclusion, and Belonging	**Briefly describe the link between goal #2 and institutional priority area(s) selected.** SUNY Potsdam utilizes the Transact e-commerce solution for web-based payments. This platform can be utilized for both student account payments, as well as e-Market sales of various items (such as a fitness center membership). Web-based payments allow for administrative ease when handling and reconciling cash collections, as well as provide convenience to students and families with an online payment gateway available for self-service 24/7.

GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

2A: 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.
2B: Student Accounts will create an Online Transact storefront for all new initiatives requiring payment collections, whenever possible.

GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

2Ai Method: Review instructional content available annually.
2Ai Target: Prior to fall orientation sessions beginning.
2Aii Method: Review method of payment types used on student accounts annually using Banner data extracts.
2Aii Target: 90% use of e-commerce payments (ACH or debit/credit card).
2B Method: Annual review of payment collection requests.
2B Target: 100% use of e-commerce solution for any new initiatives.

GOAL #3

Provide an efficient refund process to allow students streamlined access to their funds, as well as prevent unreconciled items on the campus bank statement.

| GOAL #3 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply)

☒ Retention and Enrollment
☒ Financial Stability and Analysis
☐ Academic Programs and Planning
☐ Strengthening Community Connections
☐ Diversity, Equity, Inclusion, & Belonging | **Briefly describe the link between goal #3 and institutional priority area(s) selected.**

The student refund process is necessary when an overpayment toward an account occurs, or an adjustment for tuition and fees is made on an account already paid. In many cases, delivery of a student refund allows students the opportunity to pay for educational expenses not on their SUNY Potsdam billing statement. The campus partners with BankMobile Disbursements (BMTX), an online bank, to deliver refunds to our students. Students are given the option to deposit to an existing bank account, or create an account with BMTX. When students do not utilize BMTX appropriately, refunds are returned to the campus. The substantially delays the student receiving their funds, and sometimes prevents them from receiving them at all. In addition to this inconvenience to the student, it creates an administrative burden related to banking services and unclaimed funds responsibilities for the campus. |

GOAL #3 – DESIRED OUTCOMES AND OBJECTIVES
Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

3A: Supply refunds to students in a timely manner, consistent with federal financial aid regulations
3B: Utilize BMTX tools and campus resources to encourage students to use this third-party refunding option

GOAL #3 – ASSESSMENT METHODS, MEASURES, AND TARGETS
Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

3A Method: Review output registries from refunding at the end of each fiscal year
3A Target: Process refunds a minimum of once per week, but not less than every 14-days
3B Method: Review Refund Trends and Performance data through BTMX
3B Target: At least 90% of all refunds delivered electronically via BMTX