

**SUNY Potsdam
Administrative Unit Assessment Plan**

Administrative Unit: Student Accounts

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Date Submitted: May 19, 2020

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.

Goals	Desired Outcomes/Objectives	Assessment Methods and Targets	Results	Planned Improvements Based on Assessment Results
1. Maximize Potential Resources	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> A. Review current 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 	<ul style="list-style-type: none"> A. Determined an additional professional is needed B. Billing and Payment Process were noted as negative C. Current employees following as required; new employees require training D. COVID-19 pandemic creating gap in team unity 	<ul style="list-style-type: none"> A. Hired an Assistant Director for the Unit. during Fall 2017 B. Opened One Stop customer service unit January 2019. C. Professional staff members will continue to review new information as it is released through the SUNY Bursar listserv as well as through consultation with director of financial aid D. Holding Bi-Monthly team "morale checks" via video conferencing
2. Improve Customer Service	<ul style="list-style-type: none"> A. Train staff on how to respond and manage pertinent issues including diversity and student & parent inquiries in a 	<ul style="list-style-type: none"> A. Review student data from the New Student Transitions Survey and Student Satisfaction Survey 	<ul style="list-style-type: none"> A. Survey data pending. B. Responses generally positive 	<ul style="list-style-type: none"> A. Customer Service tasks transitioned to One Stop unit in January 2019. On-going training

	<p>significant way</p> <p>B. Train staff on phone and general customer service etiquette</p>	<p>Results</p> <p>B. Collection and Analysis of feedback from office email account inquiries</p>		<p>occurring.</p> <p>B. Implementation Team for TeamQ phone queuing software install just began.</p>
<p>3. Improve Collection of Funds</p>	<p>A. Ensure timely payments on student accounts</p> <p>B. Ensure cash collection site deliveries are processed in a timely manner.</p>	<p>A. Review and Analyze Billing and PAG processes</p> <p>B. Communications with cash collection sites</p>	<p>A. Continue to have prior term balances carrying from one semester to the next</p> <p>B. 95% compliance rate</p>	<p>A. Plan to Implement change to BU hold to decrease to \$100; began dropping students who register with balances over \$1,000</p>