



Administrative Process Improvement Student Financial Appeals Outcomes

The Student Financial Appeals team met to review current processes and procedures, data use policies, and implement an electronic process for students to submit appeals. The team adhered to policy, eliminated unnecessary approvals and streamline process and replaced outdated database.

Process Enhancements:

- Developed a new on-line form that authenticates the student, populates student's course information, accepts electronic signatures and has workflow approval process.
- Login authentication ensures students eligible to submit form within the twelve month terms.
- Student and course information is pre-populated from Banner, ensuring data integrity.
- Eliminates paper forms, manual data entry and reduces errors.
- Form allows for required documentation to be uploaded and stored on database. Eliminating copying and filing paper documentation.
- New database was created replacing outdated technology.
- Eliminated manual tedious refund calculations, registrar office enters refund codes into Banner and system calculates refund.
- IT created a nightly process to process AR transactions from the appeals system and post student's refund to Banner records, eliminating manual entry.
- Updated procedures and web pages.
- Developed automated email communications.
- Administrator Dashboard easily tracks the status of a request.

Guideline Review:

- BF10246 – Filing a Fee Appeal
 - Updated language to reflect an electronic process.
 - Removed outdated procedures and web links.

Metrics:

- Staff hours associated with processing 278 paper forms = 31.5 weeks (1,182 hours).
- New process time savings in an academic year = 278 forms * 1 hour = 278 hours, a time savings 24 weeks (904 hours).
- Cost savings in reduction of 11 reams paper printing and reduction in file folders.

Future Recommendations:

Second Level Appeal Process:

- Incorporate the AVP Finance appeal review process with the new system.

Third Level Appeal:

- Team recommends that a team be formed to review and determine if university should offer a third level appeal. If continue the process, review the current process for any inefficiencies.