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Student Services Transformation

Student Services Transformation (SST) Update

Faculty Senate
April 6, 2010

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Student Services Transformation

Agenda

1. Background
2. Timeline and Status
3. Some Benefits of the New System
4. Some Concerns about the New System
5. System Preview
6. Preparing for Change

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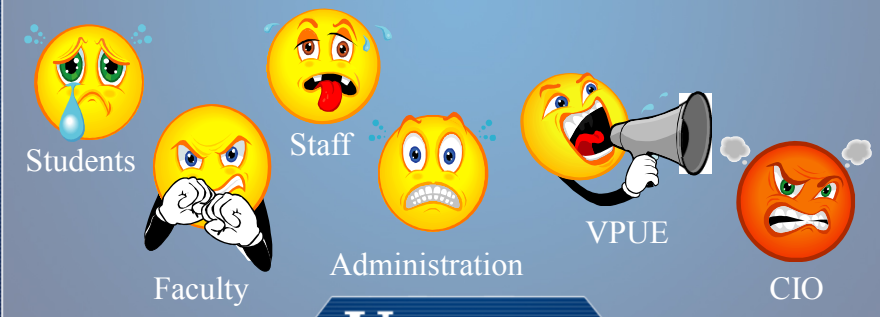
Student Services Transformation

Current operations tend to be in a mode of crisis management, rather than strategic planning.



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Student Services Transformation

Goals

- Improve service
- Manage institutional risk
- Ensure consistency between policy and practice
- Extend real-time access to integrated systems and data
- Implement a more flexible system
  - Current institutional needs
  - Planned institutional growth

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Student Services Transformation

Scope: What's in?

- Academic Advising (Degree Audit)
- Admissions
- Financial Aid
- Student Financials
- Student Records
- Upgrade MyUB
- Upgrade to Scheduling (R25 and Schedule 25)
- Upgrade to GrAdMIT
- On-Line Training Tutorials (UPK)
- Document Management System
- Electronic Payment
- Data Warehouse
- Interfaces for enterprise systems

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Student Services Transformation

Student Systems Assessment

- Launched Spring 2007
- Project Teams formed
- External consultants hired
- Surveys and workshops held to:
  - Understand business processes and needs
  - Assess current system
- Identified opportunities to improve policies and procedures
- Assessed ERP options – selected PeopleSoft Campus Solutions

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Student Services Transformation

Guiding Principles

- Campus stakeholders need electronic access to real time data, eliminating need for "shadow systems"
- Provide outstanding customer service for every student-related process
- Capture data once, then share campus-wide
- Use data & effective reports to drive decisions
- Develop common student processes, while supporting unique and compelling needs of schools
- Keep system customization to an absolute minimum
- Maximize self-service functionality

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Student Services Transformation

Guiding Principles

- Establish/utilize decision due dates to keep the project implementation on-time, and on-budget
- Project team work will be collaborative & "silo-free"
- Campus stakeholders will be engaged in ongoing, two-way communication opportunities
- Participation/engagement is expected, non-responsiveness implies agreement
- All student system-related changes/purchases must be CIO-approved

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Student Services Transformation

Governance

- Executive Steering Committee
- Project Directors Team
- Project Management Team
- Core Project Team
- Advisory Groups:
  - Campus Community Advisory Group
  - Data Access Advisory Group
  - Directors Advisory Group
  - Faculty Advisory Group
  - Student Advisory Group
- http://www.buffalo.edu/ub2020/sst/membership.html

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Student Services Transformation

Campus-Wide Commitment

Core Project Team includes representation from:

Academic Planning and Budget
Academic Processing Services
Academic Services, CIO Operations
Administrative Computing Services
College of Arts and Sciences
Division of Athletics
Enterprise Infrastructure Services
Financial Aid
Financial Processing Services
Graduate Enrollment Management Svcs.
Graduate School of Education
Graduate School Student Services
International Education
School of Dental Medicine
School of Law
School of Medicine and Biomedical Sciences
School of Nursing
School of Pharmacy & Pharmaceutical Sciences
School of Social Work
Student Academic Records and Financial Svcs.
Student Advising Services
Undergraduate Admissions
University Communications
Vice Provost of Undergraduate Education

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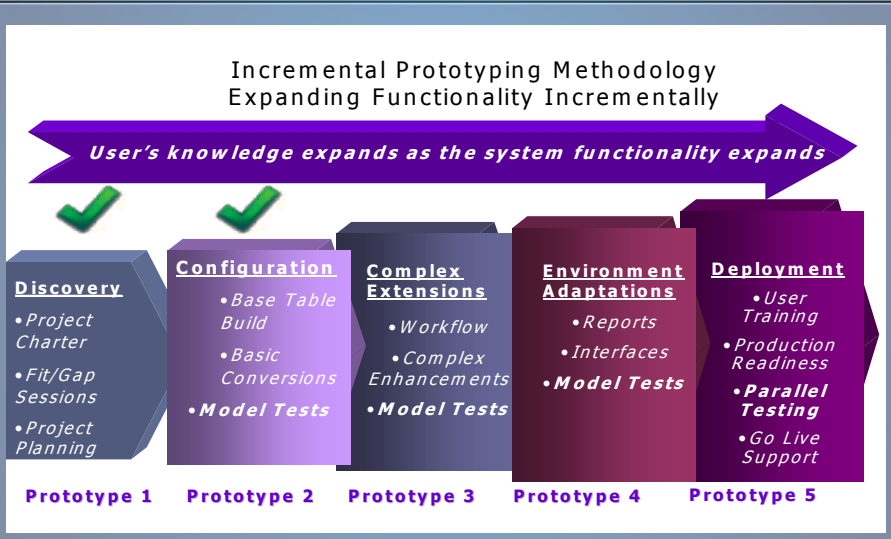

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Student Services Transformation

Timeline

- Core Configuration began January 2009; Completed January 2010
- Complex Extensions and Environmental Adaptations began July 2009
- Go Live dates for the Summer 2011 semester:

Go Live #1	Student Records – Course Catalog	February 2010
Go Live #2	Campus Community, Admissions, Student Records – Schedule of Classes, Portal	August 2010
Go Live #3	Financial Aid	February 2011
Go Live #4	Student Records-Registration	March 2011
Go Live #5	Student Financials	May 2011
Go Live #6	All remaining Student Records items and Academic Advising/Degree Audit	July 2011

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Student Services Transformation

Detailed Timeline

Student Records	Course Catalog – Central Scheduling only Ahead of schedule and under budget	February 2010
Portal	Look and feel updates – Students, Faculty and Staff	May 2010
Admissions	Applications for Summer and Fall 2011	August 2010
Portal & Campus Community	MyUB: Biographic and demographic information for Summer and Fall 2011 incoming students	August 2010
Student Records	Schedule of Classes – Department Schedulers	August 2010
Financial Aid	ISIR Loads – Summer and Fall 2011	January 2011
Academic Advising	Degree audit reports for Fall 2011 incoming undergraduate transfer students	January 2011

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Student Services Transformation

Detailed Timeline

Admissions	Decision processing for Summer and Fall 2011 applicants	January 2011
Admissions	Matriculate students	March 2011
Campus Community	New Student Information System becomes system of record for all UB students	March 2011
Portal	Updates to MyUB for all Faculty, Staff, and Students	March 2011
Financial Aid	Packaging for Summer and Fall 2011	March 2011
Student Records	Registration for Summer and Fall 2011	March 2011
Student Financials	Cashiering; refunding; tuition calculation; and self-service	May 2011

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Student Services Transformation

Detailed Timeline

Financial Aid	Direct Loan processing	June 2011
Student Financials	Billing for Summer 2011; Late fee processing	June 2011
Student Records	Grade entry and grade posting; transcript generation; end of term processing	June 2011
Financial Aid	Disbursement of Summer 2011 aid	July 2011
Student Financials	Billing for Fall 2011; Collections	July 2011
Academic Advising	Degree audit reports for all undergraduate students; some graduate students	July 2011
Financial Aid	Disbursement of Fall 2011 aid; TAP certification	August 2011

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Student Services Transformation

Detailed Timeline

Student Records	Posting degrees	September 2011
Student Financials	1098T processing	October 2011

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Student Services Transformation

Major Accomplishments

- Discovery Phase Complete
- Core Configuration Complete
- Course Catalog live for course changes and viewing
  - Training materials available at sistraining.buffalo.edu
  - Implemented ahead of schedule
- Document management live for Financial Aid (with legacy)
- Upgrade to ePay live (with legacy)
- Upgrade to scheduling software (R25)
- Identified data warehouse solution
- Implemented software to aid in back-end IT support
- Project currently on time and under budget

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Student Services Transformation

Some Benefits of the New System

- Overall – Increased integration
- Academic Advising
  - Interactive degree audit
  - Student planner
  - Goal of all undergraduate programs, plans, and sub-plans in the system
- Admissions
  - Application status in self-service
  - Coordination with Financial Aid
  - Track required transcripts for transfer students
  - Checklist for each stage of applicant

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Student Services Transformation

Some Benefits of the New System

- Campus Community – Available to all areas
  - Increased flexibility of service indicators
  - Checklists
  - Comments field
  - Communications attached to student record
- Financial Aid
  - Financial aid self-service on-line, including Checklist items
  - Document imaging and expedited processing
  - Improved compliance
  - Electronic award letters
  - Tools to prevent over-awarding

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Student Services Transformation

Some Benefits of the New System

- Portal
  - Gateway to increased self-service
  - Improved/updated user interface
  - Streamlined channels
- Student Financials
  - More detailed student account on-line
  - Electronic billing, including international students
  - Automated refunds and direct deposit for 90% of refund types
  - Meets SUNY collection requirements
  - Additional means of collecting via ACH payments
  - Integration with Financial Aid
  - Increased flexibility, including differential tuition

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Student Services Transformation

Some Benefits of the New System

- Student Records
  - Multiple instructors
  - Unique academic calendars
  - Prerequisite checking
  - Registration features
  - Disallow self-registration for multiple repeats and R grades
  - Improved tracking of student status, including academic standing
  - Classlists in real-time, display Resigns
  - Final exam scheduling

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Student Services Transformation

Some Benefits of the New System

- Transfer Credit
  - Prerequisite checking
  - Transfer articulation “locked” until change of major
  - Complete real-time sharing of data
- Reporting
  - Increased functionality of the data warehouse
  - More extensive, higher quality data available
  - Ability to leverage existing data/reporting services

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Student Services Transformation

Some Concerns about the New System

- Overall – More clicks
- Academic Advising - Change
- Admissions
  - International Admissions Database and GrAdMIT
  - Additional steps in processing students admitted to the major
- Campus Community – Need for collaboration, processes, and procedures
- Financial Aid
  - Substantial business process redesign
  - Complexity of processes requires extensive testing
- Portal
  - High level roles
  - Transition period between two systems

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Student Services Transformation

Some Concerns about the New System

- Student Financials – Business process redesign, including less automation for Student Accounts office processes
- Student Records
  - Security and Business Process Redesign
  - INT major changes no longer self-service
- Transfer Credit
  - UB's complex articulation rules
- Reporting
  - PeopleSoft terminology, need to understand "new" data
  - Definition of data for UB's needs
  - Reports will need to be rebuilt

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Student Services Transformation

Intro to the New UB Student Information System

- Terminology
  - Divisions are careers
  - Majors and minors are plans
  - Concentrations are subplans
  - Semesters are terms
  - Credits are units
  - See list at http://sistraining.buffalo.edu/pdfs/glossary.pdf

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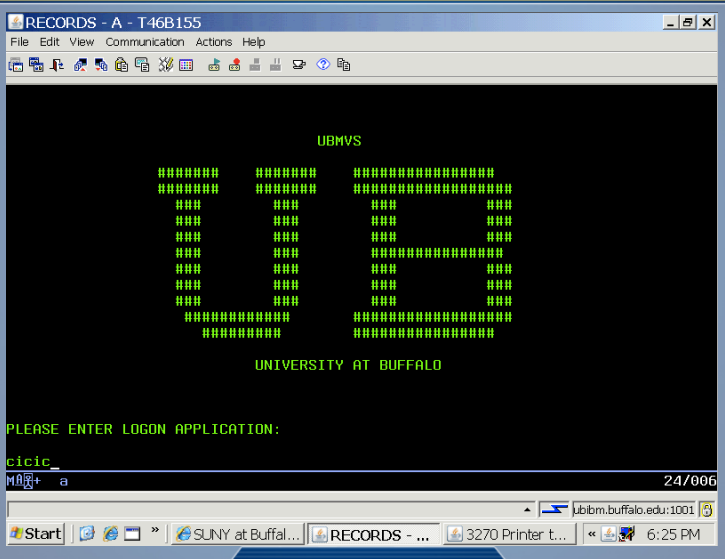

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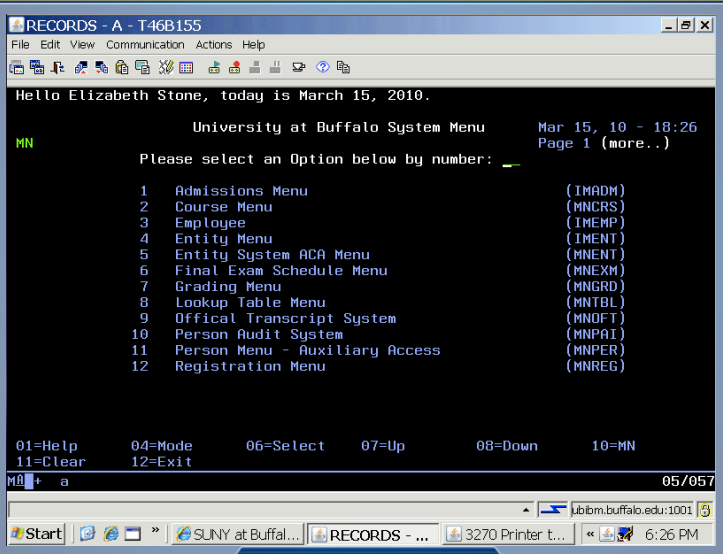

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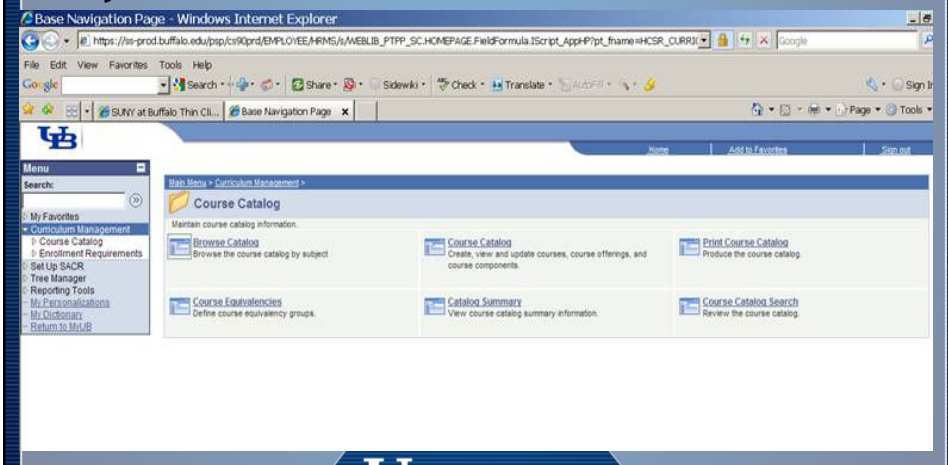
Intro to the New UB Student Information System



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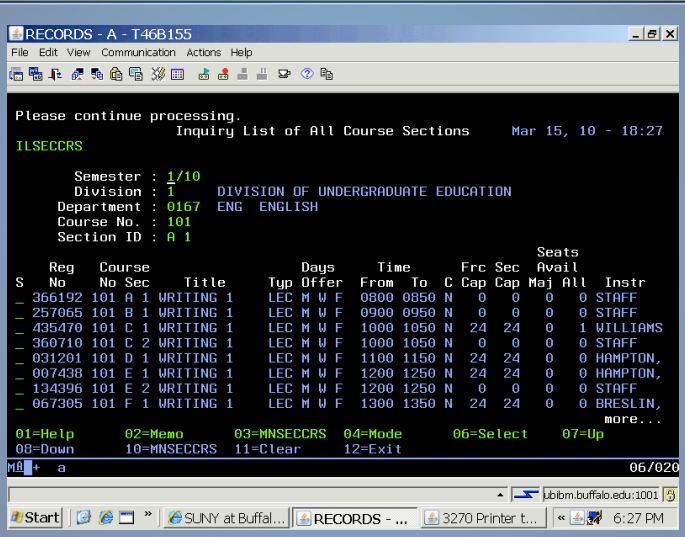

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Student Services Transformation

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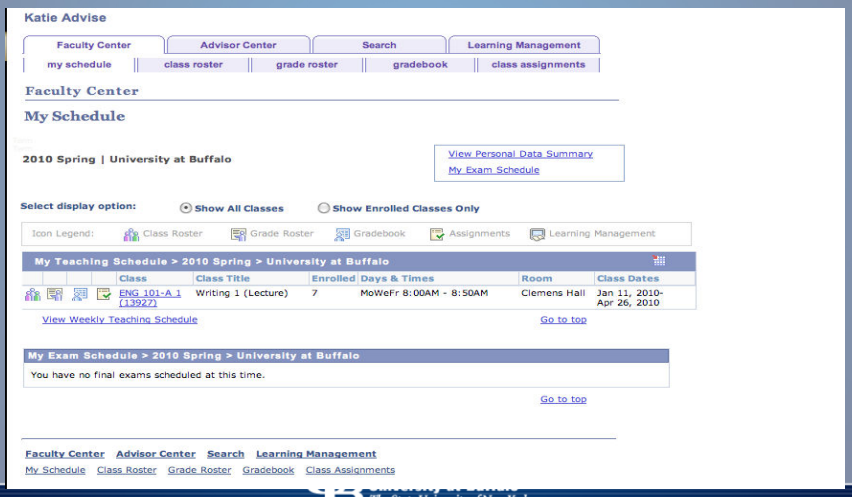
Student Services Transformation

Faculty Schedule



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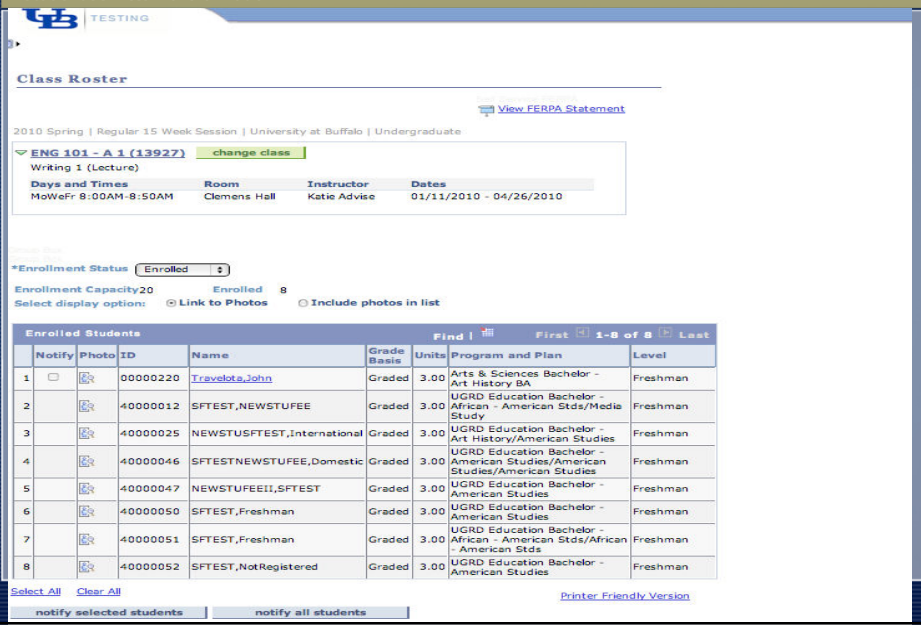

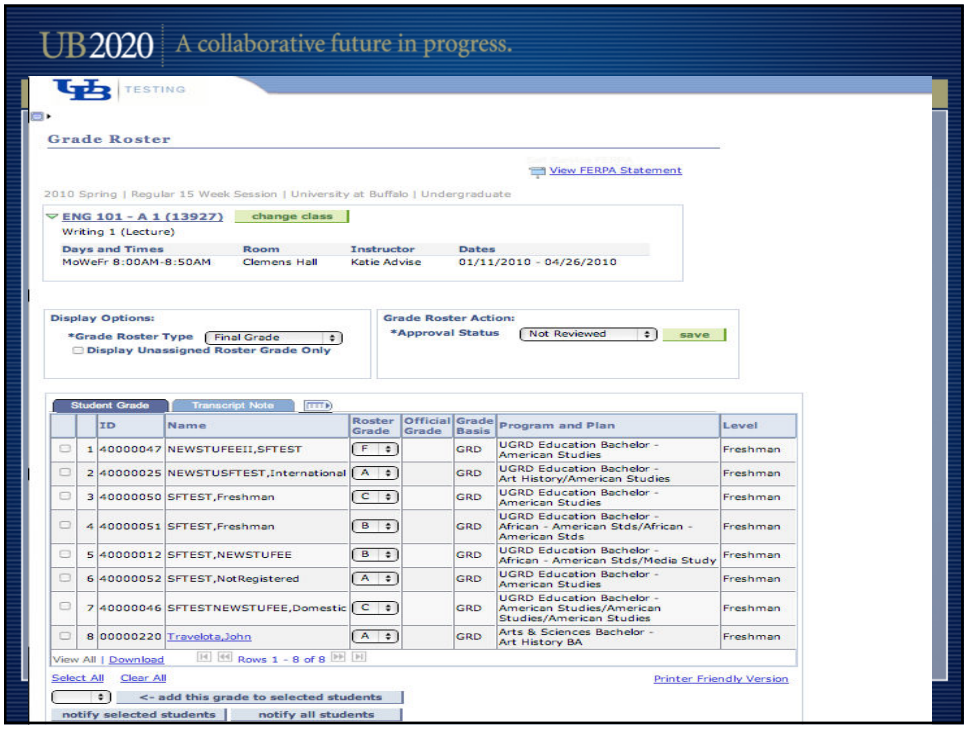
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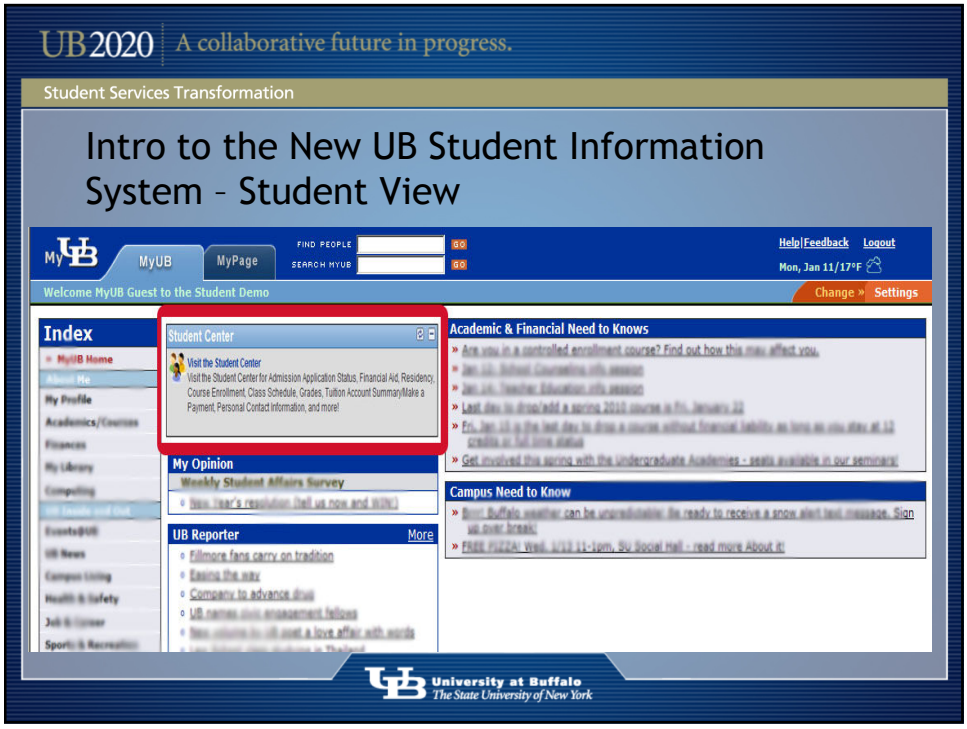
TESTING
Grade Roster
View FERPA Statement
2010 Spring | Regular 15 Week Session | University at Buffalo | Undergraduate
ENG 101 - A 1 (13927) change class
Writing 1 (Lecture)
Days and Times Room Instructor Dates
MoWeFr 8:00AM-8:50AM Clemens Hall Katie Advise 01/11/2010 - 04/26/2010
Display Options:
*Grade Roster Type Final Grade
Display Unassigned Roster Grade Only
Grade Roster Action:
*Approval Status Not Reviewed save
Student Grade Transcript Note
ID Name Roster Grade Official Grade Grade Basis Program and Plan Level
1 40000047 NEWSTUFEEII,SFTEST F GRD UGRD Education Bachelor - American Studies Freshman
2 40000025 NEWSTUSFTEST,International A GRD UGRD Education Bachelor - Art History/American Studies Freshman
3 40000050 SFTEST,Freshman C GRD UGRD Education Bachelor - American Studies Freshman
4 40000051 SFTEST,Freshman B GRD UGRD Education Bachelor - African - American Stds/African - American Stds Freshman
5 40000012 SFTEST,NEWSTUFEE B GRD UGRD Education Bachelor - African - American Stds/Media Study Freshman
6 40000052 SFTEST,NotRegistered A GRD UGRD Education Bachelor - American Studies Freshman
7 40000046 SFTESTNEWSTUFEE,Domestic C GRD UGRD Education Bachelor - American Studies/American Studies/American Studies Freshman
8 00000220 Travolota,John A GRD Arts & Sciences Bachelor - Art History BA Freshman
View All | Download Rows 1 - 8 of 8
Select All Clear All
Printer Friendly Version
<- add this grade to selected students
notify selected students notify all students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Student Services Transformation
Intro to the New UB Student Information System – Student View
MyUB MyPage
FIND PEOPLE
SEARCH MYUB
Help|Feedback Logout
Mon, Jan 11/17°F
Welcome MyUB Guest to the Student Demo
Change » Settings
Index
MyUB Home
My Profile
Academics/Courses
Finances
My Library
Student Center
Visit the Student Center
Visit the Student Center for Admission Application Status, Financial Aid, Residency, Course Enrollment, Class Schedule, Grades, Tuition Account Summary/Make a Payment, Personal Contact Information, and more!
Academic & Financial Need to Knows
Are you in a controlled enrollment course? Find out how this may affect you.
Last day to drop/add a spring 2010 course is Fri. January 22
Get involved this spring with the Undergraduate Academies - seats available in our seminars!
My Opinion
Weekly Student Affairs Survey
Campus Need to Know
FREE PIZZA! Wed. 1/13 11-1pm, Slv Social Hall - read more About it!
UB Reporter More
Fillmore fans carry on tradition
Easing the way
Company to advance drug
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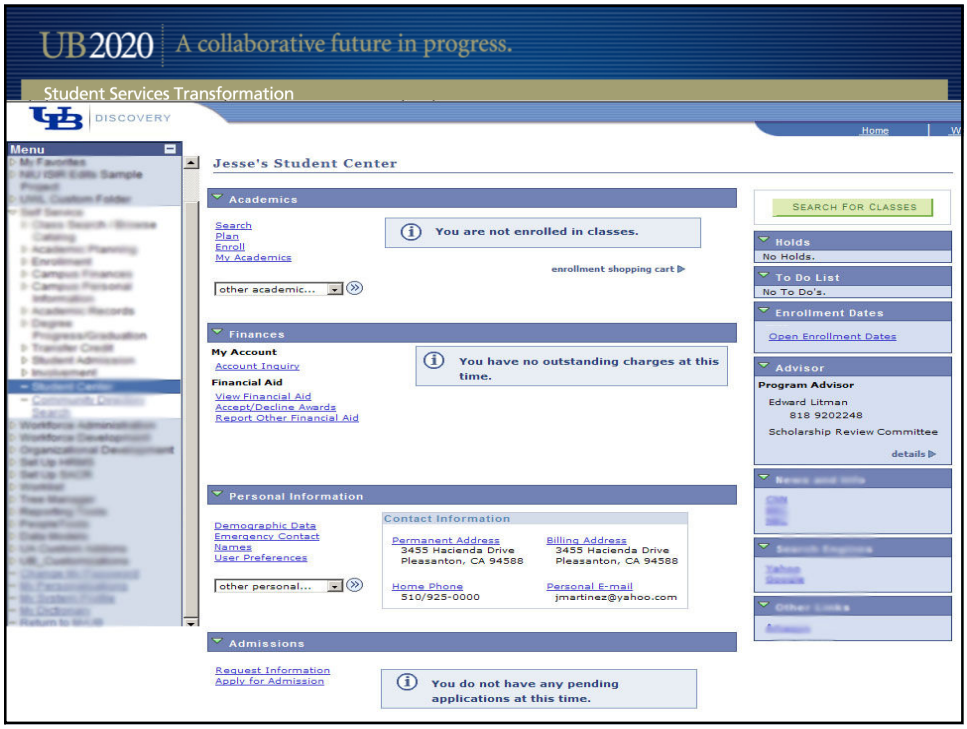
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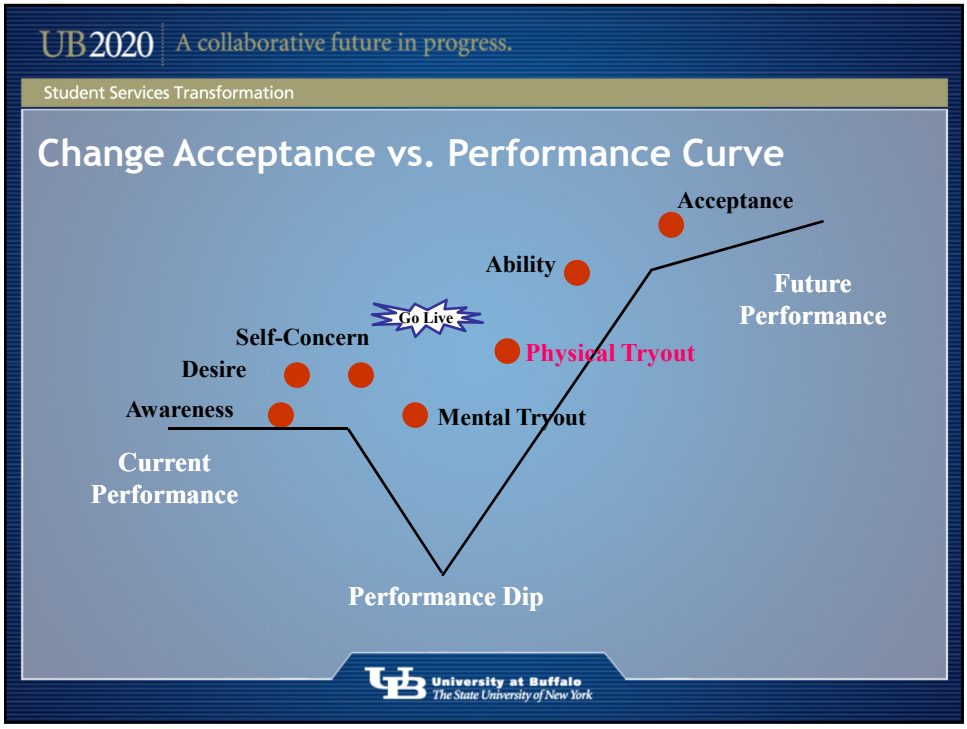
Student Services Transformation
DISCOVERY
Home
Menu
Jesse's Student Center
Academics
Search
Plan
Enroll
My Academics
You are not enrolled in classes.
enrollment shopping cart
other academic...
Finances
My Account
Account Inquiry
Financial Aid
View Financial Aid
Accept/Decline Awards
Report Other Financial Aid
You have no outstanding charges at this time.
Personal Information
Demographic Data
Emergency Contact
Names
User Preferences
other personal...
Contact Information
Permanent Address
3455 Hacienda Drive
Pleasanton, CA 94588
Billing Address
3455 Hacienda Drive
Pleasanton, CA 94588
Home Phone
510/925-0000
Personal E-mail
jmartinez@yahoo.com
Admissions
Request Information
Apply for Admission
You do not have any pending applications at this time.
SEARCH FOR CLASSES
Holds
No Holds.
To Do List
No To Do's.
Enrollment Dates
Open Enrollment Dates
Advisor
Program Advisor
Edward Litman
818 9202248
Scholarship Review Committee
details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Change Acceptance vs. Performance Curve
Acceptance
Ability
Future Performance
Go Live
Self-Concern
Physical Tryout
Desire
Awareness
Mental Tryout
Current Performance
Performance Dip
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Communications

- SST This Month Email
  - Project Updates
  - Module Updates
- Reporter and Spectrum Articles
- Specific Go-Live Communications
- SST Website at www.buffalo.edu/ub2020/sst
- Two-Way Communications
  - Change Readiness Assessment Surveys
  - Feedback to us at ub-sst@buffalo.edu
- *We would love to present to other groups!*

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Training

- Materials and sessions developed based on job roles
- For Faculty and Staff:
  - Delivered as close to go-live as possible
  - In-person training sessions
  - Train the Trainer approach
  - For staff, system access will be provided at training session
- For Students, Faculty and Staff
  - On-line interactive training and job aids
  - sistraining.buffalo.edu
- We're looking for help – Let us know if you are interested!

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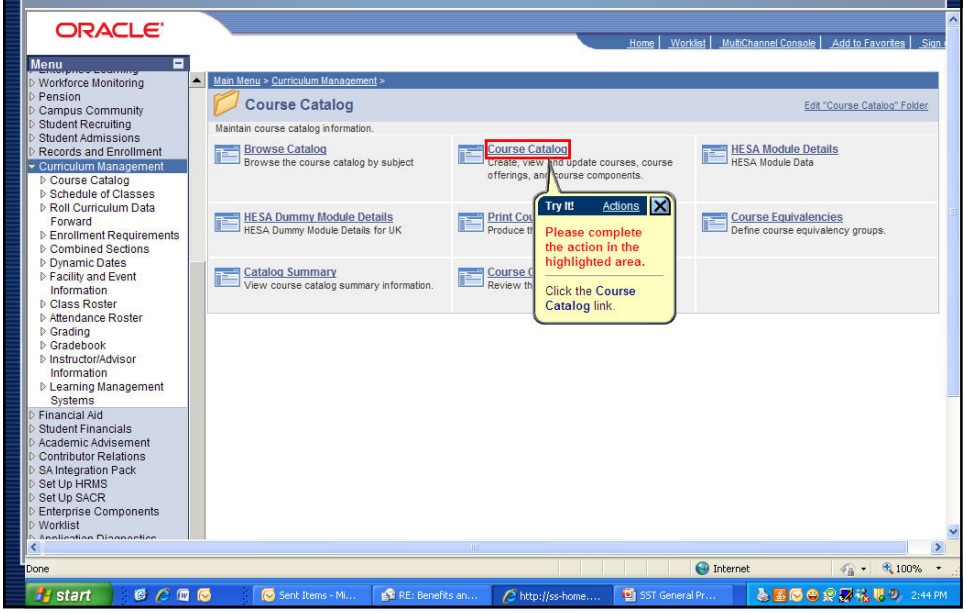

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Student Services Transformation

Faculty Engagement

- Presentations like this one
- Presentations to existing groups
- Faculty Advisory Committee
- Lunch and Learn sessions
- Workshops at critical times
- *Suggestions?*

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Student Services Transformation

See the SST Web site for:

- Guiding Principles
- Project Charter (goals, process, procedures)
- Organization and Governance
- Strategies:
  - Communication
  - Data Access/Reporting
  - Data Conversion
  - Database Instance
  - Organizational Change Management
  - Training
- Communications – Current and Archive
- FAQs

http://www.buffalo.edu/ub2020/sst

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Student Services Transformation

Thank you!

Questions and Discussion

We welcome your feedback!
Email us at:
ub-sst@buffalo.edu

http://www.buffalo.edu/ub2020/sst

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