

1. Assessment Plan - Four Column



PIE - Administrative Services: Cashier's Office Unit

Where We Are Now: Analysis and Summary

2018-19

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External Conditions, Trends, or Impacts (Student Services): Enrollment continues to increase - Increase of 2,516 students between FY 17/18 and 18/19

Student Headcount 2018-2019 - 66,559

Student Headcount 2017-2018 - 66,061

Student Headcount 2016-2017 - 61,962

Internal Conditions, Trends, or Impacts (Student Services): The Bursar's Office is committed to providing excellent customer service. Throughout the years we have found that many students are confused by the Bursar's Office name, which creates difficulty in explaining directions to and the purpose of the Bursar's Office. In our continuous effort to better serve our students, in October of 2018 we successfully updated our office name to Cashier's Office so that students more easily recognize where to go to pay various fees including registration, field trips, production cards, parking permits/citations, etc., as well as get assistance with setting up their BankMobile refund preference selection. All services offered to students at this office remain the same.

Additionally, the Cashier's Office updated its office hours as follows:

Monday – Thursday 8:00 a.m. – 4:30 p.m.

Friday 8:00 a.m. – 11:00 a.m.

Due to the limited amount of student traffic and transactions processed on Friday's, these new hours have helped to reduce district funds spent on overtime as staff was previously working 45 hours/week on average.

We also hired a permanent Fiscal Technician I to fill the previous vacancy as a result of a retirement.

Notable Achievements for Theme A: To Advance Academic Excellence and Student Achievement: Processed 17,168 Payment transactions

Processed 7,885 Miscellaneous fee transactions (print cards, clay cards, supply cards, test and certification fees, etc.)

Sold 14,019 Parking permits

Processed 603 parking permit replacements

Processed 185 parking permit returns for refund

Received 6,243 incoming calls and assisted students with questions regarding fees, BankMobile refund selection, holds, 1098-T, etc.

Notable Achievements for Theme B: To Support Student Access and Success: Prepared BankMobile Refund Selection Instructions to assist students on how to make their refund selection.

Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources: PCI Compliance for payment card processing.

Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration: Successfully completed implementation of BankMobile Single Sign-on with the support of Information Technology and Financial Aid

Collaborated with the Parking Office in revising their Parking Permit Announcement to students

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<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
<p>Professional Development - To promote training and cross-training to enhance employee knowledge that will increase productivity, encourage collaboration and personal growth. Status: Active Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19 Goal Entered: 06/14/2017</p>	<p>Report directly on Goal</p>	<p>Reporting Year: 2018-19 % Completed: 25 Three staff were trained on the student refund process to provide additional resources and coverage for this weekly task during critical times, employee vacations, etc. With the resignation of our Coordinator in the Cashier's Office, we were also able to open the opportunity for a Fiscal Specialist to temporarily work out-of-class in this position, which has provided an opportunity to gain new experience and professional growth. (07/01/2019)</p>
<p>Develop Procedures - To develop internal and external procedures to improve efficiencies and collaboration Status: Active Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19 Goal Entered: 06/14/2017</p>	<p>Report directly on Goal</p>	<p>Reporting Year: 2018-19 % Completed: 25 With the hiring of a new Fiscal Technician I and the resignation of the Coordinator, many of the departments processes and procedures were reviewed. Several updates were made to these processes. This is an ongoing departmental goal. (06/17/2019)</p>
<p>Upgrade of Banner system - Upgrade of Banner for Student Accounts Receivable in 2016-17, 2017-18 and 2018-19 Status: Active Goal Year(s): 2016-17, 2017-18, 2018-19 Goal Entered: 06/26/2017</p>	<p>Request - No Funding Requested - Banner has transitioned to quarterly upgrades. A list of upgrades is sent from the IT department for us to review and test. The next quarterly upgrade is due in September 2019. What would success look like and how would you measure it?: To implement the quarterly upgrade with no effect on day-to-day operations and to see an</p>	

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improvement from Ellucian of the software.

Type of Request: IT SUPPORT:
 Requests for projects related to the implementation, integration, application, delivery, and support of information and instructional technologies.

Planning Unit Priority: Medium