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Online Acceptance of Admission with TouchNet and Colleague Self Service

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Online Acceptance of Admission

1 What is Online Acceptance for Pacific University?

2 How Pacific University Went Online

3 What Were the Results?

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About Pacific University Oregon

- **Pacific University Oregon (Ory-gun)**
 - Founded in 1849 for Oregon Trail Orphans
 - Small, private university with campuses in Forest Grove, Hillsboro, Woodburn and Eugene
 - 5 Colleges; Arts & Sciences, Optometry, Education, Health Professions, Business
 - 3,900 FTE, Undergraduate & Professional, split 50/50
 - Colleague since 1993 (UniData), ODS 2008, Recruiter 2011
 - Mascot is Boxer, a Chinese qilin (dog-dragon)



- **This session will explain how Pacific University:**
 - Switched from multiple deposit payment methods to a PCI compliant method
 - Switched from snail mail award letters to online letter acceptance.
 - Provided earlier access to advising and registration
- **You will see how this solution:**
 - Reduced the workload in the Admissions, Business and Financial Aid Offices
 - Provides a modern experience for students and parents
 - Is sustainable and transparent

What is Online Acceptance for Pacific University?



What is Online Acceptance for Pacific University?

- **Online Acceptance involves 6 processes:**
 - Automated Creation of Network Account to Log In
 - Automated Email to Student of Account Activation Link
 - Online Financial Aid through Colleague Self Service
 - Online Deposit Payment through TouchNet Bill + Pay
 - Automated Deposit Posting to Student Account
 - Semi-Automated Matching of Deposit to Application

Automated Creation of Network Account to Log In

- **Triggered by Admit Status in Application in Colleague**
- **Overnight ODS refresh builds an Admitted Student View**
- **Home Grown Scripts Create Active Directory Account**
- **New Admitted Student IDs in Saved Lists in Colleague**
- **Saved Lists used to set up WebAdvisor and Self Service Access**
- **Increase of about 8,000 accounts per year.**

Automated Email to Student of Account Activation Link

- **Email address from CRM Recruit which was imported into Colleague**
- **Account Activation Email has a link to go directly to account setup page in a home grown user management system**
- **Have the capability to resend the Account Activation email**
- **If no Email Address we provide instructions on account activation**
- **Alumni and Former Students already have accounts**

Online Financial Aid through Colleague Self Service

- **Financial Aid Office uses ODS views to identify newly admitted students**
- **Packages the aid and sets them up with a Financial Aid checklist**
- **Sends Communications Management email with links and instructions**
- **Workflows in Self Service guide the student through the process.**
- **Students request loan changes and accepts or rejects awards online**
- **Award letter is accepted online**
- **PDF version of award letter is available for hard copies**

Online Deposit Payment through TouchNet Bill + Pay

- **TouchNet Bill + Pay links on many Pacific web pages and in emails**
- **LDAP Authentication**
- **Credit Cards or ACH for checking or savings account**
- **Proxy Access for student's authorized users, e.g. parents**
- **Term and program specific tuition deposit**
- **Colleague eCommerce can provide similar functionality**

Automated Deposit Posting to Student Account

- Real time, 2 way connection between TouchNet Bill + Pay and Colleague
- Posts to a Cash Receipts batch
- Cash Receipts Batch reconciled and posted many times per day (SEMA & CGLP)
- Posting puts the deposit on the student AR account
- Deposit on AR account is shown on the ASUM form

Semi-Automated Matching of Deposit to Application

- **ODS view provides a list newly deposited student's applications**
- **Staff reviews view and determines which application gets the deposit**
- **Staff marks the Deposit received in Colleague which triggers a status update in CRM Recruit.**
- **Status Update in CRM Recruit triggers a workflow to inform counselor**
- **Counselor contacts student with congratulations and thanks**

How Pacific University Went Online



Project Team

- **Project champion was Assistant VP for Enrollment Management**
- **Undergraduate and Graduate Admissions Operations staff**
- **Network System Administrator**
- **Enterprise Database Administrator**
- **Financial Aid Director and Systems Administrator**
- **Accounts Receivable Manager**
- **Enterprise Systems Manager/Project Manager**

Software and Services

- **TouchNet Bill + Pay Deposits, Payment Center and PayPath**
- **Colleague Self Service Financial Aid and WebAdvisor**
- **Colleague Recruitment/Admissions and Cash Receipts**
- **Colleague ODS and Microsoft Access as the query tool**
- **CRM Recruit with Colleague integration**
- **Colleague Web APIs**
- **Active Directory and LDAP**
- **Home grown user management system (myAccount)**

Resource Requirements for Development, Testing and Project Management

- **License for Self Service Financial Aid (SSFA)**
- **Implementation of SSFA – 200 hours**
- **Account creation scripts – 40 hours**
- **Saved Lists, ODS views, Intra-day ODS refresh –100 hours**
- **Online deposit procedures and documentation – 40 hours**
- **Project Management – 60 hours**

Results



Positive Results

- **Over 50% online deposits**
- **Students can deposit more quickly from anywhere**
- **Mobile friendly, 21st century experience**
- **Less data entry by Accounts Receivable staff**
- **First Colleague Self Service implementation**
- **First use of Pacific University's Online Project Request Form**

Less Than Optimal Results

- **Students want to see award package before it is ready**
- **Students can be admitted before the financial aid year begins**
- **Students did not like the 2.75% convenience fee for credit cards**
- **Increased account activation support buy the Helpdesk**
- **8,000 more Active Directory accounts per year**
- **Payment incorrectly made to Student Receivables, not Deposits**

Next Steps



Next Steps

- **Implement Self Service Proxy for Financial Aid**
- **Improve procedural communications with students**
- **Automate the saved list processing (DMIS, DMIU, DMOU, BURA)**
- **Enhance “Confirmed Status Calc Subroutine” set up in CPRS to recognized Deposit Codes in addition to Application Status**
- **Set up graduate deposits**
- **Automate setting end date in Resource Roles for students who did not deposit**

Questions & answers



Summary

- **Online Acceptance involved 6 processes to give students network credentials to manage their financial aid and pay their deposit**
- **Pacific University created feeds and interfaces for 8 different systems**
- **Not all feeds and interfaces are fully automated, but what the student sees is seamless.**
- **The structure of the solution is scalable**
- **Since all software and services were already licensed (except SSFA) the out of pocket cost was low**
- **Details on all the processes, software and services are available. Contact Steve Mason if interested.**

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Thank you

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