3Cs for Student Financials: Collections, Comments, & Communications

Session #33129
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Your Presenter

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- Over six years of experience working Campus Solutions 9.0 Student Financials and Campus Community. On the implementation teams for SF and CC.s
CU Boulder

- Campus Solutions 9.0, PeopleTools 8.53, patched through B32
- PSFinance 8.4 (upgrading to 9.2)
- HCM 8.9 (upgrading to 9.2)
- Enterprise EPM 9.0, Enterprise Portal 9.0
- PS Enterprise CRM 9.1

Founded in 1876, the Boulder campus was the first of the four University of Colorado campuses.

Over 29,000 degree seeking students
- Over 24,000 undergraduates
- Over 5,000 graduates

65% Colorado residents
35% nonresidents
Agenda/Contents

- Administrative Functions
- Comment Categories
- 3C Security
- Communication Generation Configuration Fundamentals
- 3C Engine/Population Update
- Mass Delete
Administrative Functions

Student Financials has several administrative functions to choose from, each has variable data fields that correspond to SF screens and processes.
## Administrative Functions

<table>
<thead>
<tr>
<th>Code</th>
<th>Administrative Function</th>
<th>Variable Data Fields</th>
<th>Bind Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEN</td>
<td>General</td>
<td>None</td>
<td>SCC_PS_GENP_BND (Persons)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>SCC_PS_GENO_BND (Orgs)</td>
</tr>
<tr>
<td>SFAC</td>
<td>Student Financials Account</td>
<td>Business Unit, Account Number, Account Term</td>
<td>SCC_PS_SFAC_BND</td>
</tr>
<tr>
<td>SFBI</td>
<td>Student Financials Billing</td>
<td>Business Unit, Invoice ID</td>
<td>SCC_PS_SFBI_BND</td>
</tr>
<tr>
<td>SFCO</td>
<td>Student Financials Collections</td>
<td>Business Unit, Collection ID</td>
<td>SCC_PS_SFCO_BND</td>
</tr>
<tr>
<td>SFGR</td>
<td>Student Financials Groups</td>
<td>Business Unit, Group ID</td>
<td>SCC_PS_SFGR_BND</td>
</tr>
<tr>
<td>SFIT</td>
<td>Student Financials Item Lines</td>
<td>Business Unit, Item Number, Line Sequence Number</td>
<td>SCC_PS_SFIT_BND</td>
</tr>
</tbody>
</table>
# Administrative Functions

<table>
<thead>
<tr>
<th>Code</th>
<th>Administrative Function</th>
<th>Variable Data Fields</th>
<th>Bind Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFPA</td>
<td>Student Financials Payments</td>
<td>• Business Unit</td>
<td>SCC_PS_SFPA_BND</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Payment ID Number</td>
<td></td>
</tr>
<tr>
<td>SFPR</td>
<td>Student Financials Promise</td>
<td>Checklist Date Time</td>
<td>SCC_PS_SFPR_BND</td>
</tr>
<tr>
<td>SFRC</td>
<td>Student Financials Receipt</td>
<td>• Business Unit</td>
<td>SCC_PS_SFRC_BND</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cashier's Office</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Receipt Number</td>
<td></td>
</tr>
<tr>
<td>SFRF</td>
<td>Student Financials Refund</td>
<td>• Business Unit</td>
<td>SCC_PS_SFRF_BND</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Refund Number</td>
<td></td>
</tr>
<tr>
<td>SFTP</td>
<td>Student Financials Contracts</td>
<td>• Business Unit</td>
<td>SCC_PS_SFTP_BND</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Contract Number</td>
<td></td>
</tr>
</tbody>
</table>
Comment Categories

Academic Institution: CUBLD  CU Boulder
Comment Category: BCPHON

Category Details
*Effective Date: 01/01/1901  *Status: Active
*Description: Collections Phone Call
Short Description: BCPHON
*Administrative Function: SFCO  Student Financials Collections
Comments:
*Changes Allowed: No
Comment Categories

CU set up categories corresponding to each SF Administrative Function having an administrative component so that front-line staff could link to Person Comment Entry from various SF Pages using the Comment Icon.
Comment Categories

Variable data is carried from Customer Account
Comment Categories

For Collections, comment categories were set up for each of the follow-up

<table>
<thead>
<tr>
<th>Follow Up</th>
<th>Description</th>
<th>Comment Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAD</td>
<td>Bad address</td>
<td>BCBAD</td>
</tr>
<tr>
<td>BANKRUPTCY</td>
<td>Bankruptcy</td>
<td>BCBANK</td>
</tr>
<tr>
<td>DISPUTE</td>
<td>Tuition Dispute</td>
<td>BCDISP</td>
</tr>
<tr>
<td>EMAIL</td>
<td>E-mail</td>
<td>BCEMAI</td>
</tr>
<tr>
<td>JUDGEMENT</td>
<td>Judgement</td>
<td>BCJUDG</td>
</tr>
<tr>
<td>PAYPLAN</td>
<td>Payment Plan - Making Payments</td>
<td>BCPAY</td>
</tr>
<tr>
<td>PAYPLNVOID</td>
<td>Payment Plan – Void</td>
<td>BCPAYV</td>
</tr>
<tr>
<td>PHONE</td>
<td>Phone Call</td>
<td>BCPHON</td>
</tr>
<tr>
<td>PYMTM</td>
<td>Payment Made-Mail In</td>
<td>BCPMTM</td>
</tr>
<tr>
<td>RETRO</td>
<td>Retroactive w/d</td>
<td>BCRETR</td>
</tr>
<tr>
<td>RTND/COLL</td>
<td>Return from PCA</td>
<td>BCRETR</td>
</tr>
<tr>
<td>SAVEFRCOLL</td>
<td>Saved from PCA</td>
<td>BCSAVE</td>
</tr>
<tr>
<td>SENDTOCOLL</td>
<td>Send to PCA</td>
<td>BCSEND</td>
</tr>
<tr>
<td>TEMPHOLD</td>
<td>Temporary Hold on notices</td>
<td>BCTEMP</td>
</tr>
<tr>
<td>WRITEOFF</td>
<td>Write-off</td>
<td>BCWRIT</td>
</tr>
</tbody>
</table>
3C Security

• 3C groups define a group of users with similar needs for accessing 3C data.
• At the individual comment category or communication level, access is granted to one or many 3C groups.
• User level SACR security determines if the user has access to 3C data and whether their access is inquiry only, update or delete.
3C Security - Example

- **3C Update/Inquiry Group Definition**
  - 3C Group Access
  - SACR - User Security

**Student Financial System Staff**
- Collection Comments and Communications
- Inquiry, Update, Delete

**Fin Aid Bursar Employee**
- Financial Aid Comments, Checklists and Communications
- Inquiry only
Communication Generation

• CommGen allows an institution to maintain history and track information about what communications have been made with individuals or organizations.

• CU’s Bursar office uses CommGen for hardcopy and electronic communications with students about their Student Financials account activity.

• CommGen Sessions at this conference:
  • Tuesday – Communication Generation: It’s Really Easy! 11:00-12:00 (33109)
  • Wednesday – Troubleshooting Communication Generation 9:15-10:15 (33105)
Communication Generation Fundamentals

- Download the BI Publisher Add-In for MS Word.
- Two types of PS queries:
  - Data source query
  - Population selection query using the bind record for the specific Administrative Function.
- Set up the following for Communications:
  - Letter Code (letter template)
  - Communication Context (how communication is sent)
  - Communication Category (controls security)
  - Communication Speed Key
  - Communication Data Source
  - Create Report Definition to tie the Letter Code to the RTF Template.
- Set up the appropriate 3C security
3C Engine

- The 3C engine allows you to assign comments, communications and checklists automatically based upon events and other triggering criteria.
- A population selection query may be used and should include the bind record for the specific Administrative Function.
- CU assigns comments and communications with events and queries, or from external files.
- Events set the rules by which the system identifies sets of communications, checklists and comment records for the 3C engine to enter or update.
- Events require the same 3C security setup already discussed.
**Event Definition**

**Academic Institution:** CU Boulder

**Event ID:** BCOMMENT

**Effective Date:** 10/24/2013

**Description:** Bursar Office Comment

**Short Description:** BurComment

**Function:** GEN

**Communication Key:**

**Comment Category:** SF General Comments

**Comment:** Enter your comment to be mass assigned via the 3C Engine. Effective dating can be used to maintain history of comments assigned over time.
Duplicate management can be used in conjunction with variable data associated with the administrative function. For example, a student should only receive one refund notification per unique refund number.
Deleting 3Cs

Depending upon user level 3C security, 3C information can be deleted at the student level, or by using the mass delete processes.
Delete Comments
Delete Communications
Questions?
Contacts

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  • Bursar’s Office
  • University of Colorado Boulder
  • E-mail: amberly.scheppach@colorado.edu
  • Phone: 303-492-5573
Recommended References

- “Communications Configuration & Communication Generation” Session 27893 from 2010 San Antonio, TX Alliance
- “Collections Module made easy to process students in an efficient and effective manner!” Session 30049 from 2012 Nashville TN Alliance
- And subsequent webinar 12/14/12: http://www.heug.org/p/do/vi/sid=17096
This presentation and all Alliance 2014 presentations are available for download from the Conference site at www.alliance-conference.com

Presentations from previous meetings are also available.