“The staff at Bursar are always extremely friendly and professional.”

- 2021 Customer Service Survey
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MISSION STATEMENT

To the University Community:

University Bursar provides Student Account Receivable (SAR) and General Accounts Receivable (GAR) services to support the research, teaching, public-service and economic development missions of the University of Illinois System.

This annual report outlines University Bursar accomplishments and new initiatives during FY 2021. It also highlights our continued effort to provide superior quality services to support University of Illinois System student, families, clients, departments, faculty, and staff.

By ensuring accurate and timely billing processes, and delivering accessible, up to date resources, University Bursar continues to be an innovative leader of providing best in class service to students and customers with in the University of Illinois System.

William A Patterson
Senior Director

“I greatly appreciate the quick response to my questions. It’s so very helpful.”
WHO WE SERVE

University Bursar serves over 94,000 students across the University of Illinois System by ensuring accurate and timely billing processes, training team members and delivering accessible, up-to-date resources online, via email, telephone, and in-person.

GENERAL ACCOUNTS RECEIVABLES (GAR)

FY21 we have served 67 departments over the three universities and satellite campuses over all of University of Illinois.

- **GAR ACCOUNTS CREATED**
  - 1,747
  - (2,280 in 2020)

- **GAR BILLS CREATED**
  - 27,499
  - (33,826 in 2020)

- **DETAIL CODES CREATED**
  - 990
  - (2,000 in 2020)

STUDENT ACCOUNTS RECEIVABLES (SAR)

- **STUDENT ACCOUNTS**
  - 703,485
  - (702K in 2020)

- **1098-T FORMS**
  - 123,676
  - (120 K in 2020)

- **REFUNDS ISSUED**
  - $326M
  - (531M in 2020)

- **STUDENT DIRECT DEPOSIT**
  - 71,264
  - (72,712 in 2020)
OPERATIONS

University Bursar manages all billing and payment processes related to Banner Student and General Accounts Receivable (SAR and GAR).

PAYMENTS

Our billing and payment portals accept e-checks, credit cards, lockbox, and international payments.

Students are notified via their University e-mail account reminding them to view their student account for recent activity and to pay the amount due by the due date.

The student account is available online for students and Authorized Payers of those students to view and print. It includes all transactions such as changes assessed for tuition, fees, and university housing; financial aid, payments and refunds; and payments for other credits.

<table>
<thead>
<tr>
<th>PAYMENTS</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>EChecks</td>
<td>$702M</td>
<td>$707M</td>
<td>$617M</td>
<td>↓ 12.73%</td>
</tr>
<tr>
<td>Credit Cards</td>
<td>$54M</td>
<td>$58M</td>
<td>$87M</td>
<td>↑ 3.25%</td>
</tr>
<tr>
<td>Wire</td>
<td>$84M</td>
<td>$71M</td>
<td>$108M</td>
<td>↑ 53.46%</td>
</tr>
<tr>
<td>Lockbox</td>
<td>$92M</td>
<td>$91M</td>
<td>$94M</td>
<td>↑ 49.60%</td>
</tr>
<tr>
<td>OTC</td>
<td>$43M</td>
<td>$42M</td>
<td>$29M</td>
<td>↓ 31.55%</td>
</tr>
<tr>
<td>Other</td>
<td>$21M</td>
<td>$35M</td>
<td>$30M</td>
<td>↓ 12.26%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$996M</td>
<td>$1.004B</td>
<td>$966M</td>
<td>↓ $38M</td>
</tr>
</tbody>
</table>
Having dealt with many different Bursar offices before, I can safely say that the team at U of I is the most pleasant, friendly and helpful to interact with ever!"

Each time I have reached out to the Bursar's office they have been more than helpful.
STUDENT ENGAGEMENT

University Bursar is the initial point of contact for all University billing and payment questions and serves as an advocate to student and families, assisting with any billing disputes or problems. Interactions with students range from managing student inquiries via calls, emails, and walk-ins, creating and maintaining client relationships, marketing and communication tools, student orientations, trainings and other related activities.

According to a 2021 Customer Satisfaction survey

79%
“Strongly Agree“ the issue was answered to their satisfaction

86%
“Strongly Agree“ the CS Rep was knowledgable and friendly
ACCOMPLISHMENTS

A review of University Bursar projects and accomplishments for FY21.

QUEUE MANAGEMENT SOFTWARE
UIC Customer Service team members will be using iAdvise to manage in-person customers. The UIC campus is actively using iAdvise to manage student interaction and offered to provide the tool at to our office at no cost. University Bursar worked with the Office of the Vice Provost for Undergraduate Affairs and Academic Programs to complete set up and testing over the summer. iAdvise was implemented into production in November 2020 as a soft launch. Customer Service is not providing in-person service at this time but moving iAdvise into production is providing our team members an opportunity to familiarize themselves with the tool.

GENERAL ACCOUNTS RECEIVABLE (GAR) BILL PRINTING
GAR improved the billing and printing process. For years the process was handled in house, Previously spending up to four hours, University Bursar developed a new process that would allow GAR outsourcing. The bill file is produced in separate files and then uploaded to Mailing Services where they print and mail the files. This new process reduced our staff time from 4 hours to 10 minutes each month and was at no extra cost to our unit.

SELF SERVICE REFUND STATUS PAGE
University Bursar updated Banner Self-Service to include a new Refund status page. This page provides students the ability to view their refund details including date of processing, whether the refund was sent out as direct deposit or a check and to what bank account or mailing address the refund was sent. Annually our office processes over 100,000 refunds and receives a number of inquiries on these transactions. University Bursar staff would have to pull the information from various sources to determine the current status of a refund and potential take 2-3 days to respond during our peak periods. Having a Self-service page will decrease customer phone calls, emails, and walk-ins and virtually eliminate the 2-3 day waiting period. The new page will increase student customer satisfaction and free staff for other responsibilities.

REFUND VOLUME
The last two fiscal years the University Bursar has processed an unprecedented number of refund transactions. The increase in transactions is linked to COVID related transactions including the reduction of mandatory fees for students as well as disbursement of HEERF grants. Our normal three year average, is 99,000 refunds for $245M. Our new three year average is 159,000 refunds for $294M, that is a 60% increase. While this is a large increase, Bursar Team members were still able to review and process all refunds in a timely manner.

60% ↑ refunds
FY 21 DELEGATED AGENT PROGRAMS

APPLICATION OF PAYMENTS
The application of Payments Delegated Agent was established to allow General Accounts Receivable (GAR) departments to directly apply payments to specific departmental GAR invoices. In the past Banner AR would apply transactions following FIFO. Due to unique billing scenarios, following the standard method did not allow for departments to properly reconcile their invoices. With the new method the department is able to adjust the application of payment and reconcile there accounts successfully. This year we were able to onboard three departments.

FINANCE CHARGES
The Finance Charge Delegated Agent was implemented to allow campus partners to remove late fees. Campus partners complete the Accounts Receivable Processing course and the University Bursar Delegated Agent Charge Reversal form to become a delegated agent. These specific individuals, located across the three universities, now have access to remove late fees. This partnership has resulted in faster resolutions to student requests and streamlined processing between University Bursar and other university departments.

RETURNED CHECK PAYMENTS
Returned Check Delegated Agent was implemented to establish an agreement for a department employee to handle returned checks for their units. These agents will be responsible for following up with their unit customers on ensuring failed payments via check will get resolved and paid in a timely manner as in accordance with University policy. All agreements require training on the process, sign off from department unit heads and contacts, and final approval from University Bursar.
TEAM

University Bursar’s commitment to developing our staff is constant. Our team received certifications from: Association of Credit and Collection (ACA and Professional and National Customer Service Association (NCSA). We also have many staff with accounting, project management, and technical certifications.

Thirty (65%) of our staff received strategic professional development aligning with organizational goals in the past two years.

TRAINING

STUDENT MONEY MANAGEMENT CENTER (SMMC)

SMMC provides financial education through digital activities, individual financial coaching session, table events, webinars, and workshops.

In FY 21, the Student Money Management Center provided internships and experiential learning opportunities in communications, data analysis, and financial education throughout FY21 for approximately 15 students.

Digital Campaign / Activity 4,285
Money Mentor Referrals (in partnership with University of Illinois Extension) 58
Webinar Attendees (includes attendees from 7 Get Savvy Webinars + 1 Cash at College Webinar) 743

CASH HANDLING TRAINING

Cash Handling training educates university customers, and financial wellness training provides students with a resource to help them manage their financial well-being.

Online business boomed when a new Cash Handling track (3-course program) was introduced: https://www.obfs.uillinois.edu/training/materials/cash-handling/

Cash Handling Trainees 1,201
ALL HANDS ON DECK FY21

Each academic year, University Bursar receives over 130,000 phone, email and in person inquiries from students, parents, university departments, and other customers.

To show continuous support, specific University Bursar staff members gain cross functional knowledge while committing a minimum of 1 hour/day during the first 6-8 weeks of each semester to help answer customer service emails during peak time. All Hands on Deck was also the winner of the 2019 CACUBO Best Practices Award!

FY 21 1,468 ADDITIONAL EMAILS ANSWERED

EMPLOYEE ACHIEVEMENTS

1 Joe Shroyer and Karen McFarlin
   NACUBO Emerging Leaders Program
   (June, 2021)

2 Nikita Hutchings
   UIS Employee of the Month
   (April, 2021)

3 Alice Seaton
   2021 University Bursar Peer Recognition award
   (April, 2021)

4 Deborah Rahn
   2021 National Customer Service Association
   “All Star” Award
   (June, 2021)

STUDENT TO EMPLOYEE RATIO*

National Average

1,385

University Bursar

1,963

Ratio to student employee is HIGHER than that of the national average

*Average Number of students per FTE staff member
LOOKING AHEAD

1 Student Worker Call Center
University Bursar is implementing a Student Contact Center to assist with bursar inquiries. The contact center will reside at University of Illinois Urbana-Champaign and a Business Administrator Associate (BAA) will manage the Student Contact Center. The Customer Service management team will help the new manager by developing and implementing training, be available to answer questions, and assist with hiring and onboarding of new students.

The Student Contact Center is in direct support of President’s Killeen strategic pillars and the University of Illinois Urbana-Champaign Student Success Initiative. Hiring preferences to students with federal work-study will provide job opportunities for students from moderate to low-income families. Support and time off related to a student’s academic calendar will be allowed which is a key benefit compared to private sector employment opportunities for our students. Finally, student employment is a positive experience and prepares and supports career readiness.

2 Banner Communication Module (BCM) Emails
Currently there are about 10 different campaigns that are all handled manually through the Bursar communication team. In FY22, we will be converting some of the campaigns to utilize BCM. It will allow us to better schedule our customer service campaigns, automating the process and freeing up staff time.

3 Intelligent Process Automation (IPA)
DETAIL CODE APPROVAL PROCESS
University Bursar handles approximately 2,000 detail code requests each year from departments. These requests are currently handled with an online form that contains minimal workflow and requires an abundance of manual processing. University Bursar will be utilizing the IPA process to improve collection of data, providing timely feedback to departments and reducing the amount of manual processing resulting in quicker turn around times and increase department satisfaction.

SPONSOR AUTHORIZATION
Each semester University Bursar handles the billing of 200 Sponsor Accounts for 1,000 students. To facilitate this process, students are required to submit a Sponsor Authorization to the University informing the University on the details of their Sponsorship. The current application that is being used to receive the Authorization will be retired at the end of FY22. We will be working with the IPA team to develop a suitable replacement that will also improve the process for both Student and University Bursar.

GENERAL ACCOUNT REQUESTS
University Bursar handles approximately 2,500 general account requests each year from various departments. These are currently handled via email. The IPA process will create an online portal in which departments can submit new requests as well as receive updates to current accounts. The portal would also allow the department to be able to track their request and be automatically notified when their new account is ready for use.
“I always enjoying working with the Bursar group. They are super flexible and try to accommodate all requests.”