




The University of Texas at Dallas
Great Partnership:
Bursar's Office & Financial Aid Office

Presenters

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Topics for Today

- About Us
- Keys to Success
- Discussion





About Us

The University of Texas at Dallas

- 19,000 Students
- Software Systems
 - PeopleSoft
 - TouchNet Bill Payment Suite
- 55% Receive Financial Aid
- Staffing:
 - Bursar - 12
 - FinancialAid - 23

About Us

Our Structure

```

graph LR
  President --> Provost
  President --> BusinessAffairs[Business Affairs]
  Provost --- EnrollmentManagement[Enrollment Management]
  EnrollmentManagement --- FinancialAid[Financial Aid]
  BusinessAffairs --- Finance
  Finance --- Bursar
  
```


Keys to Success

Assisting students
in achieving their goals...



Keys to Success

...by assisting
each other
in achieving our goals.




Keys to Success

1. Location
2. Access
3. Communication
4. Collaboration
5. Consideration
6. Vegas Rules



1 Location






Key #1:
Location, Location, Location...

STUDENT SERVICES BUILDING
(SSB)

- Offices are centrally located
- Physical barriers are limited



2
Access



Key #2:
Access

- Access to one another
 - Staff
 - Administrators
- Access to data
 - View access to needed screens
- Information
 - Updates on Procedures
 - Shared Training Opportunities



Who's this and why is she on this presentation?@!



RESPECT!



³
Communication






Key #3: Communication

- Meetings
 - Schedule regular meetings
- Planning
 - Awarding, Billing, Disbursement, Refunds, Drop for Non-payment
- Conferring
 - Changes, Issues, Pain Points
- Updates
 - Err on the side of "need to know"

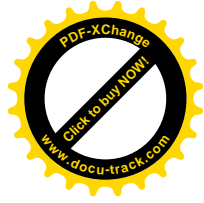
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Collaboration



Key #4: Collaboration

- Information
 - Training
 - Make sure staff understands the processes on both sides
 - Presentations
 - New Student Orientations
 - Academic Department Trainings
 - Online and/or printed information
 - Review to make sure accurate, consistent, and clear




**Key #4:
Collaboration**

- Customer Service Tools
 - Centralized online queuing system
 - Shared email management system in development
 - Common "thin-client" computer stations

**Key #4:
Collaboration**

- Process Improvements
 - Student refund procedures
 - Residency updates
 - Departmental equation variables
 - Queries, queries, queries

⁵
Consideration






**Key #5:
Consideration**

- Choose your attitude
- Empathize
- Have patience
- Focus on solutions
- Present a united front

⁶
Vegas Rules



**Key #6:
Vegas (Rules) Baby!**





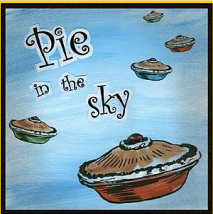
Key #6: Vegas (Rules) Baby!

This is Our Vegas



Great Partnership: Bursar's Office & Financial Aid Office

It's Not All....



- There will be challenges
- Should not be a competition
- Trust somebody! Be able to vent
- Remember the goal
- Lead by example
- Treat each other with respect



We're all in this together!





Discussion

What's worked for you?

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