Student Enrollment Services
Financial Aid Seminar

The SES provides functional support for the SIS, the IU Student Information System.

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Discussion Agenda

• Student Enrollment Services (SES)
  – Mission
  – Structure
  – Financial Aid Division
  – Decision Support
  – Compass (Scholarship Automation and Compliance Project)
SES Mission

• Support SIS operations of admissions, academic advising, financial aid, student financials, student records, and campus community activities
  – Support the policies, processes, and services of the academic mission of IU and each of its campuses

• Provide high quality service to campus units that are responsible for supporting student operations

• Perform institution-wide operations in areas of SIS system management, reporting, help desk, security, data administration, operational support, internal controls and compliance
SES Structure

• Student Information Systems
  – Student Modules
    • Student Records, Admissions, Campus Community, Financial Aid, Student Financials, and Academic Advising/Self Service
  – Academic Policies and Procedures

• University Financial Aid Office
  – Operational Support
  – Financial Aid Compliance

• Campus Services
  – Decision Support Services (Reporting)
University Financial Aid Office

• Stability of financial aid in the SIS
  – Federal and State Compliance
  – A-133 Federal Audit
  – 2008-09: Over $936 million in student aid processed to 72,852 students
• Automation of financial aid processes using SIS
  – Improving business processes with enhanced SIS functionality
• Business Process Re-design/Training Sessions
  – Critical financial aid processes
  – Emphasis on federal compliance
• Financial Aid Central Model
  – Regional campuses
• Higher Education Opportunity Act (HEOA)
  – Implemented new federal regulations
SES Decision Support

- Decision Support
  - Provided overall coordination for SIS Presence in the IUIE
  - 250 report objects created/modified
  - Business Intelligence Reporting Tool (BIRT)
  - Communication and collaboration via SharePoint
  - BI Initiative
SES Challenges

- **System Management/Operational Management and Support**
  - Support Oracle Releases and Fixes
  - Day to day operational support
  - Software functional expertise

- **SIS Projects**
  - Significant demand for enhancement projects and staff; difficult to prioritize
  - Initiatives for 2010 are large (e.g. CRM, self-service redesign, early warning); not just enhancements

- **Reporting**
  - Refine Operational Reports
  - Management Reporting
  - BI Initiative

- **Compliance**
  - Continue automation of processes in the SIS to address federal and state compliance issues
  - Higher Education Opportunity Act
SES Initiatives

• Enrollment Management
  – Initiatives to enhance the recruitment and retention of students
    • Customer Relationship Management software (CRM)
    • Scholarship Automation and Compliance Project
    • Improving advising tools
    • Focus on students/campus initiatives vs. processing
    • New infrastructure tools for departments to obtain information
    • Early intervention systems
Scholarship Automation and Compliance Project (Compass)

• The Compass Project automates scholarship processes to maximize the use of institutional funds for student recruitment, retention, and success.

• The project focuses on additional development and business process redesign to improve reporting, compliance (donor intent), and tracking of scholarship funds.

• The project is a joint effort between FMS, OEM-BL, UITS, SES, IU Foundation, and the campuses.
Why focus on Scholarships?

- Important to meet enrollment management goals

- Administered by inadequate processes
  - Software was antiquated
  - Paper applications
  - Hard to match donors to students
  - Hard to conduct financial auditing
  - Every campus and department had a separate business process
Compass Development

- Automatic Scholarships
- Scholarships that require applications
- Scholarships with donor intent
- Electronic workflow documents
- Scholarship Reporting
Compass next steps

- Graduate Fellowships
- Item type extension table
- Item type routed electronic document
- Build “Slice and Dice” functionality so that students can be better matched to awards that have donor intent, which will be used for the Campus-Wide Applications as well as for scholarships that don’t require applications
- Create a searchable website of all IU Scholarship opportunities for use by students, parents and administrators
- Better reporting and auditing between Financial Aid, Student Financials, Financial Management System and IU Foundation accounts
Questions or concerns?

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