



# The New Bill

---

Creating a new billing statement  
outside of IFAS



# Background

---

- i Feedback from students
- i Feedback from departments
  - 1 Financial Aid
  - 1 Admissions
  - 1 Registrar
  - 1 Retention Committee
  - 1 Ops Committee



# Defining the problem

---

- i Ease of read
- i Perceived missing information
  - 1 Snapshot in time
- i Miss understood information
  - 1 Break down of the charges
- i Miss understood data flow
  - 1 Tuition – Registrar
  - 1 Room and Board – Housing
  - 1 Scholarships, Grants, and Loans – Financial Aid
  - 1 Late fees, Finance Charges, Payments - BSO



# Identifying the Source of Problems

---

- i IFAS deemed unreliable
- i PowerFaid/IFAS interaction
- i Billing scripts run outside of IFAS
- i Too Many Steps
  - ┆ No Logic
- i Could not understand saved data
  - ┆ Framework of IFAS
- i Illogical calculations



## Solution

---

- i Build the Billing Statement Outside of IFAS
  - ┆ Use separate database
- i Rework the calculations
  - ┆ Balance forward based on date
  - ┆ No stored totals
- i Use Crystal Reports to calculate and print bills
  - ┆ Save the bills in PDF



# Results

---

- i Easier to read bill
  - ┆ Formatted
- i Understandable calculations
  - ┆ Letters going out with bills
- i Viewable history
- i Better Service



All transactions through 7/11/2007  
Aid not yet credited is for the term  
Fall 2007

Novato, CA 94949

<b>Balance Forward</b>		<b>\$4,070.00</b>
STDT	pynt-tuition	\$4,060.00
STDT	pynt-tuition	-\$6,075.00
DFEE	reverse finance fee	-\$20.00

**Balance Before Financing Fees:** -\$6,075.00  
**Accepted Aid Not Yet Credited for Current Term:** \$0.00  
**Total Due Before Financing:** (\$6,075.00)  
**Late Fee:** \$0.00  
**Finance Charge:** \$0.00  
**Current Payment Due:** \$0.00

The billing statement reflects all charges and credits as of the date noted on the top of the bill. You have 10 calendar days from the payment due date to submit the minimum payment due or a \$20.00 Late Fee will be assessed. You may pay by cash, check, or credit card. If you have any questions please contact the business services office at 415-257-4161 or by email at bills@dominican.edu

**Total Current Balance:** (\$6,075.00)

Please detach and mail with payment

<b>NAME</b>	<b>Account Number</b>	<b>Account Balance</b>	<b>Payment Due Date</b>
		(\$6,075.00)	August 01, 2007
<b>Medical Insurance Code</b>	<b>Plan Code</b>	<b>Minimum Due</b>	<b>Payment Amount</b>
	COHO	\$0.00	

Cards one: VISA / MASTERCARD / AMEX

Check #  Card #

Exp. Date  Signature

Fax your credit card payment in at (415) 257-0190



# Limitations

---

- i Statements/Account not available on line
- i Additional database needs to be managed
- i Billing Infrastructure Knowledge held by one person (me)
  - 1 Job Security



# Future

---

- i Integration with PowerCampus
- i Outsourcing
  - ┆ Online statement presentment
  - ┆ Online payments
  - ┆ Extended Payment Plan