

# 2016 Best Practices Proposal Form



**CACUBO**  
Central Association of College  
& University Business Officers

Completed proposals are to be submitted to [bestpractices@cacubo.org](mailto:bestpractices@cacubo.org) or by contacting Donna Rohlfer, Director, CACUBO Best Practices Awards, [rohlfedm@miamioh.edu](mailto:rohlfedm@miamioh.edu).  
The deadline is April 30, 2016.

## Best Practices Program Submission:

**Title:** *Missing University Payments Gets You Noticed Quickly*

## Primary\* Contact Information:

*The primary contact must be a CACUBO member institution of higher education.*

Institution: Wichita State University

Address1: 1845 Fairmount Street

Address2: Box 38

City: Wichita State/Prov: KS Zip Code: 67260-0038

Salutation:  Prof.  Dr.  Mr.  Mrs.  Ms.

First Name: Robyn Middle Name/Initial:

Last Name: Bongartz Suffix (Jr, III, etc.)

Professional Title: Student & AR Fiscal Operations-Financial Operations

Email : robyn.bongartz@wichita.edu

Phone: (316) 978-6014 Fax: (316) 978-3107

\*Additional team contacts may be listed at the bottom of this form.

## Institution Information:

Institution:  Research  Comprehensive/Doctorate  Small Institutions  Community College

Year Founded: 1895

Geographical Location: Midwest

Number of Students: 15,000

Website: www.wichita.edu

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## Statement of the Problem:

*Provide a brief statement identifying the challenge your institution encountered that benefited from your best practice.*

**Due to the rising cost of higher education, Wichita State University experienced an increase in our past due accounts receivable balances which required us to review our current business practices for university collections. We have a very small Collections department, consisting of just two staff members. Most processes were being done manually. We were challenged to automate processes to increase efficiency in production without increasing the number of staff to do the job.**

## Identify the Solution (250-words maximum):

*Describe how you identified and developed your best practice solution including those involved with the process, impact on the organization, finances and resources.*

- One month before the final term late fee is assessed, Accounts Receivable partners with Financial Aid and Office of Student Money Management to more efficiently assist students with appropriate resources.
- Obtain crucial missing data through the use of promissory note prior to allowing for transcript and enrollment services exceptions.
- Created separate classifications for each collection agency and the final individual demand letter before collection agency activities begin. This has enabled WSU to impound transcripts and restrict future enrollment on delinquent accounts.
- Created separate classifications for each account in Banner indicating the number of statements. This ensures two internal attempts occur.
- Created separate classifications in Banner for each account type which creates a control for preventing unnecessary execution of billing statements.
- Combined three due diligence letters into one. Reworked verbiage in letter to make it more customer friendly.
- Moved ERP account updates from manual to automated allowing for mass versus individual updates.
- Partnered with five separate external Collection Agencies to ensure they would also collect internationally. Expanded submissions to Kansas Setoff Program after researching procedures for missing critical data.
- Moved release of holds from manual to automated process. Account codes are now removed within 15 minutes once an account has a \$0.00 or negative balance.
- Extended timeline to be on a customer's credit report by actively collecting on accounts that are less than seven years old and writing off older accounts.
- Reports were created to monitor accounts and turn these accounts more quickly to the collection agencies.

## Implementation Timeline:

*Provide a bulleted list of the steps and implementation timeline of your best practice solution.*

1. March 2015 – Strategized with Financial Aid and Office of Student Money Management
2. April 2015 – Worked with Registrar's Office regarding transcript/registration holds
3. May 2015 – September 2015 – Worked with IT to automate processes
4. September 2015 – Redesigned letters
5. September 2015 – March 2016 – Worked with Collection Agencies regarding accounts

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6.

## Benefits & Retrospect:

*Provide a brief statement of the benefits achieved by implementing the best practice solution.*

We believe that best practices encompass partnering with other offices, using technical resources, utilizing external resources to the fullest potential and taking a courteous, respectful customer service approach to an extremely sensitive issue. In addition, by using more efficient processes, WSU created a green environment by eliminating the printing of thousands of paper reports and files.

The table below reflects the number of accounts and amounts turned to an agency from 2013 to current date. These figures reflect the dramatic increase in the number of accounts and amounts turned to an agency as a result of our automation in processes.

Fiscal Year	No. of Accounts Referred for Collection	Amount Referred
2013	1,610	\$ 2,920,466.99
2014	1,780	\$ 3,306,352.71
2015	1,554	\$ 2,869,883.25
<i>First three quarters of FY2016</i>	2,948	\$ 6,068,064.69

The table below reflects the amount collected by calendar year. We anticipate recovering approximately \$760,000 of past due debt this current calendar year.

Calendar Year	Total Amount Collected from Collection Agency
2014	\$ 434,889.31
2015	\$ 557,359.94
<i>Anticipated for 2016</i>	\$ 760,000.00

## Additional Team Contact Information:

### Additional Contact #2:

Institution:

Address1:

Address2:

City:                      State/Prov:                      Zip Code:

Institution:     Research     Comprehensive/Doctorate     Small Institutions     Community College

Salutation:     Prof.     Dr.     Mr.     Mrs.     Ms.

First Name:                      Middle Name/Initial:

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Last Name:                      Suffix (Jr, III, etc.)

Professional Title:

Email :

Phone:                      Fax:

## Additional Contact #3:

Institution:

Address1:

Address2:

City:                      State/Prov:                      Zip Code:

Institution:       Research       Comprehensive/Doctorate       Small Institutions       Community College

Salutation:       Prof.       Dr.       Mr.       Mrs.       Ms.

First Name:                      Middle Name/Initial:

Last Name:                      Suffix (Jr, III, etc.)

Professional Title:

Email :

Phone:                      Fax:

## Additional Contact #4:

Institution:

Address1:

Address2:

City:                      State/Prov:                      Zip Code:

Institution:       Research       Comprehensive/Doctorate       Small Institutions       Community College

Salutation:       Prof.       Dr.       Mr.       Mrs.       Ms.

First Name:                      Middle Name/Initial:

Last Name:                      Suffix (Jr, III, etc.)

Professional Title:

Email :

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*updated Feb 2016*