# SAM Implementation

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| PACKAGED SOLUTION | FINANCE - FEES, FUNDING & SAM | STU3 COLLABORATIVE PROJECT |

▶ A SAM implementation project to manage all student debt - with extensive use of student self-service and automation.

"What we wanted was a **more integrated student experience**, where the student could interact with the system as a self-service, and **take the pressure off staff** where possible. This was **the primary aim** of the SAM project." **George Harris, Fees Manager, UAL**

STUDENT SYSTEM SOLUTIONS

STU3 CASE STUDY
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## The Challenge

**University of the Arts London** had embarked on an ambitious project to implement the Tribal SITS student records system, and as part of the project, to bring all student tuition fee and debt ledger processes into SITS via the SAM debt management module. Stu3 was selected as the SITS expert consultancy partner to configure and deliver the SAM project.

A key objective of the SAM project was to improve the student experience when it came to fees and finances by allowing them to manage much more of this online, and to make things more efficient for staff at the back end, which in turn would free up staff to spend more time servicing the students.

ONE STOP
SHOP SOLUTION

Key to this was providing a one stop shop solution for debt management, tracking, invoicing and receipting via e:Vision tasks, where users could view student statements and all fee transactions and financial information in one easy-to-use online solution.

**Marta Fonseca-Voyiatzis, Head of Income Services** describes the limitations of UAL's legacy solution. *"Before the introduction of SAM we had the fees in SITS, and the payments in our finance system.  It was impossible to marry the two together such as to show the full picture of fees outstanding at enrolment and throughout the year."*  This meant that if a student wanted to know their balance or request a refund for example, they had to email or call the Finance Team. It was a very manually driven process, with the onus on the student to contact the Finance Team to find a resolution to a query or issue.

*"What we wanted was a more integrated student experience, where the student could interact with the system as a self-service, and take the pressure off staff where possible. This was the primary aim of the SAM project."* **George Harris, Fees Manager, UAL**

Stu3 were chosen to deliver the SAM Implementation solution and fulfil the following key objectives of the project:

▶ **SAM as the source of truth for all student finance transactions**, bringing Student Tuition Fees, Accommodation, Bursaries, and Short Courses into SAM as separate core debt ledgers.

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▶ **Student self-service finance portal**, enabling the student to view all their key fees and funding information, transact online payments and request refunds, and action all their core finance processes from a single easy-to-use finance portal.

▶ **Automation of routine finance processes**, including Student & Sponsor Debt Chasing, Debt Write-offs, Import of payment transactions, etc.

▶ **Integrated student payment journey**, for a seamless online process from end to end - from viewing the fees due, making the online payment, viewing the receipt, downloading the student statement, and completing the enrollment or graduation.

▶ **Integration with Flywire** as the main payment route for all student transactions, to improve the range of payment options available to students, and reduce the University credit card processing costs.

▶ **Improved student refund process**, including an auditable workflow, with the system managing the 'heavy lifting', this freeing up staff time.

## The Solution

Stu3 worked closely with the UAL project team to refine the requirements and scope of the all-encompassing solution. The agreed solution was delivered over two phases and included:

▶ A multi-ledger approach, with separate debt ledgers for Tuition, Accommodation, Bursaries, and Short Courses.

▶ Migration of opening balance transactions from the legacy system.

▶ Integrations:
   ▷ Interface between the SAM debtor ledger and Student payment service providers including Flywire and Global Pay (Realex), and a Flywire batch reconciliation solution.
   ▷ Integration with the SITS funding component to enable bursary, prize, and tuition fee scholarship payments through SAM.
   ▷ Interface with accommodation system Kinetix to bring in accommodation invoices.
   ▷ Interface with ABW Accounting system to post daily transactions.
   ▷ Import of the SLC Remittance file.

▶ eVision tasks for students to:
   ▷ Make Flywire payments for tuition fees before, during and after enrolment to include integrated Flywire payment into all student finance pages e.g.

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student statement, registration, admissions deposit payment, etc.

▷ Pay for Graduation tickets using Global Pay (Realex).

▷ View and add funding sources and sponsors.

▷ Request payment cancellations and refunds - requested refunds linked to staff refund tracker for seamless processing.

▷ A full suite of PDF Invoices, Credit notes, Receipts and Statements.

▷ Provide validated UK and international bank details for refund.

▷ Provide access to tuition fee statements/ transactions/invoices - with notices for upcoming payments, and transactions that may be eligible for refund.

▶ eVision tasks for staff to:

▷ Create, track, authorise, and pay student refunds.

▷ Access a dynamic view of students' accounts to monitor balances across ledgers, select specific transactions and view upcoming payments and transactions eligible for refund.

▷ Manage the debt write off workflow by Finance users.

▷ Add validated UK and international Student and Sponsor bank details for each ledger.

▶ Stu3 Fees Manager template implementation:

▷ A complete workflow to replace the use of all client fee functionality.

▷ Process fees, add overrides and payment plans.

▶ SITS Client processes:

▷ Custom batch reconciliation reports, with breakdowns of transaction type and payment method.

▷ Robust Allocation rules for each ledger paired with manual allocation rules, and overnight batch jobs to handle posting, allocation etc.

▷ Manage the student account ledgers with email notifications and emailing of invoices and credit notes to students and sponsors.

▷ Import, reconcile, and post receipt remittance file transactions from external payment providers (e.g. BACS, SLC, SAAS) into the SAM debtor ledger.

▷ Batched Student and Sponsor debt chasing using XDMP, with defined stages and updates - including associated workflows for sending debtors to the debt team and managing the process with auto notifications.

▷ Automatically apply multiple payment plans at the fee stage, as well as flexible debt rescheduling for each ledger.

## The Benefits

**George Harris**

*"The solution makes it much easier for students to manage their own tuition fee debt, and any financial transactions that happen at the university."* **George Harris, Senior Fee Manager**

SAM has enabled:

▸ Reduction in overall debt and overpayments from students.

▸ Reduced data entry required of the finance teams, due to automation of refund and write-off transactions.

▸ Efficiency savings related to automated daily batch processes.

▸ Reduced queries from students to the Finance Team, especially during enrolment, with student's being able to self-service the majority of queries that previously required staff intervention.

▸ Significant cost savings related to debt management resourcing.

▸ Significant staff and credit-card charge cost savings related to implementation of Flywire, alongside 24 hour Flywire helpdesk for student payment queries and improved student payment experience.

*"All functionality in SAM has absolutely exceeded expectations"*

**Marta Fonseca-Voyiatzis, Head of Income Services**

## Working on the project with Stu3

*"For me Stu3 and UAL were a collective seamless project team, and I think you worked brilliantly together to manage the project and you created a good relationship with each other so there wasn't any point where I felt that I couldn't get an answer to the questions that I was asking, in terms of functionality, in terms of what requirements were being met, what requirements we had to report. Every step of the way everything was discussed with me and I am very pleased with that."*

**Marta Fonseca-Voyiatzis, Head of Income Services, UAL**

*"UAL and Stu3 teams really integrated and worked together very well. The communication between the two teams was exceptional. This worked so well that when I joined the project, I did not know who were the members of which team!"*

**Cordelia Lean, Project Manager, UAL**

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*"The impression I was left with was that Stu3 genuinely wanted to deliver a good product. They were really invested in coming up with something that would meet our requirements. That was reassuring and made you feel you could have faith in the suggestions being proposed. They weren't doing it in a 'well this is the quickest way of doing it' sort of way, just to get it done. I felt that they genuinely wanted the best solution for UAL."* **George Harris, Fees Manager, UAL**

**Helen Davies**

*"One thing that came across very strongly was that the Stu3 team was really committed to making it work for us. Very committed to giving us what we needed. Often, and it shouldn't be like this, with suppliers/partners it is more transactional, they get paid for a job and they just want to get it done and move on. But with Stu3 there was the strong impression to all involved that it mattered to them, that they wanted to do a good job for us and that it felt qualitatively different. I am aware that they put in the extra work to get us there. What was also impressive was how seamlessly the project went. Typically projects require a lot more input. I am often contacted outside of board meetings because of issues, but with this project that was not the case...we all knew how exceptional this was, we often told Cordelia our project manager to feed back to Stu3 and let them know how excellent the quality of their delivery was."* **Helen Davies, Associate Director, IT Services, UAL**

## Background on Client



**University of the Arts London** is a collegiate university in London, England, specialising in arts, design, fashion and the performing arts. It is a federation of six arts colleges: Camberwell College of Arts, Central Saint Martins, Chelsea College of Arts, the London College of Communication, the London College of Fashion, and the Wimbledon College of Arts. UAL was established as a university in 2003, and took its present name in 2004.

# Let's chat.

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