



STUDENT  
SYSTEM  
SOLUTIONS

ual university  
of the arts  
london

## Stu3 Fees Manager Template



PACKAGED SOLUTION



FINANCE - FEES, FUNDING & SAM



STU3 COLLABORATIVE PROJECT

▶ An online solution for staff to manage student fees effectively

“The Fees Manager template solution even included functionality we wouldn’t have necessarily known that we needed but actually made things a lot easier for us. It was quite a benefit because it took a lot of the pressure off having to come up with all the ideas. It was nice to have the framework of something that had been tried and tested at another institution, and that could be tweaked where required to suit our environment.”

George Harris, Fees Manager, UAL

Stu3 Case Study

[www.stu3.co.uk](http://www.stu3.co.uk)

## 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.

Key to this was **providing a one stop shop solution for processing fees**, including adding fee overrides, updating sponsorships, amending payment plans, viewing student statements and all fee transactions and financial information in one easy to use online solution.

It was decided early on that using SITS client for staff would not achieve this, and that a complete beginning to end e:Vision workflow was required to replicate all client fee functionality.



### **The fees and finance teams wanted a solution that would allow staff to:**

- ▶ Easily access all relevant student details in a simple easy-to-use and easy to view system.
- ▶ Display information from across different records (STU, SCE, ADD, SSP, FDU, FTR etc) to enable the user to see all relevant information in one place, rather than having to alternate between screens as you would need to do in the SITS client
- ▶ Access a holistic view of student finance records: see transactions due as well as incoming bursary/fund payments.
- ▶ View, update and manage student fees all from one central place, using all the standard SITS fees functionality, but via an e:Vision user-friendly interface.
- ▶ View finance notes relating to the student created by other staff at various points in the student lifecycle
- ▶ Replace multi-screen client processes, in which the finance team may be inexperienced, particularly in screens relating to the student as opposed to finance transactions (ie STU screen for SSN and VIS screen for visa expiry details).

- ▶ Improve efficiency and risk of processing errors to complete processes via a one-click solution, replacing the Client process involving multiple screens to complete a full process (e.g. GFD, GFT, PFI, STFI).
- ▶ Create Credit Notes quickly and easily for all fee types, without the risk of error.
- ▶ Be made aware of students with outstanding debt immediately and clearly.
- ▶ Amend Student Sponsorship record details easily – as well as conclude the process of amending Fee Transaction records.
- ▶ Enable the addition of manual fees
- ▶ Email students with details of their fee transactions

## The Solution

**The Stu3 Fees Manager Staff e:Vision template** provided a proven, standard, fixed-price solution that met the requirements and needs of the UAL fees and finance teams, including the following core functionality for Tuition Fees:

- ▶ Search Student to process – select SCE record to process and view summary information
- ▶ Student Details screen – core address, FST, SSN, etc data easily accessible
- ▶ Student View + Process Fees Page
  - ▷ All student fee, sponsorship, bursary, credits etc information in one place
  - ▷ View fees (FDU, FTR, LGT) and their status in a clear and easy to understand layout, with student and sponsor debt shown separately
  - ▷ Cancel fee option (FDU)
  - ▷ Add manual Fee option (FDU)
  - ▷ Select fees and post to SAM (Runs GFT1/PFI/STFI)
  - ▷ Re-calculate fees pre-posting (Runs GFD1&2)
  - ▷ Re-calculate posted fees (Runs GFT6/7)
  - ▷ Roll-back Extracted Fees (Runs GFT2)
  - ▷ Input Fee Override amount (linked to Fee Calc Rule) to apply a manual fee amendment
  - ▷ Debt warning flag to make finance team aware of students with outstanding debt immediately and clearly
  - ▷ Enable changes and overrides for Tuition Fee Instalment Plans (PYS/GFT4)
- ▶ Add and Edit Sponsorship SSPs with “Process sponsor changes” button to instantly update the student fees view page (run GFT3, PFI, STFI, and CLGB processes)
- ▶ Process Credit Notes efficiently and record a credit note reason and userID

- ▶ View and Email Student Statement via a pdf attachment
- ▶ View Staff version of Student Statement with additional information
- ▶ View staff notes related to student's fees

## The Benefits

*"I was certainly very impressed with the new fees page – I felt that it summarised all the information that needed to be considered in one place and I was so so glad it had the option to change the instalment plan and record payments in the same screen."* **Marta Fonseca-Voyiatzis, Head of Income Services, UAL**



George Harris

*"The Fees Manager template solution even included functionality we wouldn't have necessarily known that we needed but actually made things a lot easier for us. It was quite a benefit because it took a lot of the pressure off having to come up with all the ideas. It was nice to have the framework of something that had been tried and tested at another institution, and that could be tweaked where required to suit our environment."* **George Harris, Fees Manager, UAL**

## 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**

*"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**

*"What was 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. We were all impressed and aware that this was exceptional."* **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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