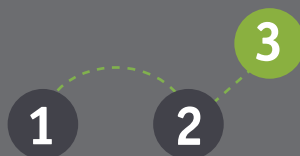




# Fees Matrix Re-implementation & Stu3 Fees Manager Template



PACKAGED SOLUTION



FINANCE - FEES, FUNDING & SAM



STU3 COLLABORATIVE PROJECT

► An online solution for staff to manage student fees effectively

“ UEL now has a **coherent view** of Student Fees both from a Student and a Staff perspective.

Student statements are available from different landscapes – SCJ or SCE. Changes to student fees which are inevitable can be **actioned and calculated rapidly** so there is no delay or confusion for the student.

From a staff perspective the amount of time spent actioning changes has been reduced and so enables staff to deal with more student enquiries ” Kathryn Digby, Finance Systems Manager, UEL

## The Challenge

The University of East London originally implemented the SITS student records system back in 2005, including the data and processes relating to Student Fees. Since then the landscape of HEIs has changed considerably in the area of tuition fees and, as with most Universities, the data to accommodate these changes had grown exponentially resulting in almost unmanageable volumes and complexity in the SITS Fees processes. In addition, UEL had not managed to encompass any of the Fees enhancements that SITS had developed in the software over the previous 10 years.

Stu3 carried out a number of workshops with key stakeholders to review the tuition fees processes and the volumes of fees data within SITS: Vision system at UEL. Examples of the volumes of key data in the finance tables were:

- 1) FST table had 180 records for 2019/20
- 2) FPE table had 12,866 records for 2019/10

The set-up and maintenance of these records was an annual overhead for the staff working in the student fees area.



Fee Calculation Rules did not manage the majority of scenarios around fee amendments, meaning users had to manually calculate and input revised Fee Amounts for students who withdraw, break in studies, transfer course etc - which added to the daily workload of the student records team.

Due to the complexity of the Fees Policy, information pertaining to part-time student fees had to be manually calculated and input to allow the fee to display on the Admissions offer letters.

Fees and Finance staff were also spending increasing time dealing with student fees queries, finding fee information, and processing fee amendments, sponsorships, and credit notes etc using the various client screens in SITS.

*“My team had to manually process all fee transactions and adjustments for the thousands of students that pass through the University each year.”* **Gregory Horswell-Lilley, UEL Student Records Manager**

## Working on the project


The UEL student records and finance teams wanted an e:Vision Fees Management solution that would allow the team 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 (i.e. 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

During the review of the tuition fees processes, it was apparent that UEL needed to rethink their Student Fees Policy to ensure that it was clear, concise and transparent to both students and staff.

When this had been completed, attention was then given to the system and business processes to ensure that this could be implemented, and the following areas were addressed:

- 
- ▶ Fee Matrix set-up and management
  - ▶ Fee calculation rules
  - ▶ Fee amendments

The entire **Fees Matrix was re-designed and streamlined**, and a consistent coding strategy was introduced to ensure that the current and future fees could be accommodated. A more coherent and simplified fee status was introduced and where in the past there has been a reliance on credits, this was replaced by new Fee Calculation rules, which were also set-up to automate the vast majority of fee amendments and adjustments.

- ▶ Fee Status (FSTs) records we reduced from 180 in 2019/20, to only 4 FSTs for 2020/21.
- ▶ Fee Profiles (FPEs) were reduced by 70%, with only 4139 FPEs needed for 2020/21
- ▶ Overall, a reduction of over 98% of values that needed to be maintained for the background fee records

**The Stu3 Fees Manager Staff e:Vision template** was implemented to provide a proven, standard, fixed-price solution to the requirements and needs of the UEL fees and finance teams, including the following core functionality:

- ▶ 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 FDU, FTR, LGT fees and their status in a clear and easy to understand layout, with student and sponsor debt shown separately
  - ▷ Cancel FDU option
  - ▷ Re-run fees calculation pre-posting (Runs GFD1&2)



- ▷ Select FDUs and post to SAM (Runs GFT1/PFI/STFI)
- ▷ Re-calculate posted fees (Runs GFT6/7)
- ▷ Process Fees Splitting (PYS/GFT4)
- ▷ Add manual FDU option
- ▷ 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
- ▶ Add and Edit Sponsorship SSPs
  - ▷ Amend and add Sponsorship SSPs
  - ▷ “Process sponsor changes” to instantly run GFT3, PFI, STFI, and CLGB processes and update the student fees view page.
- ▶ Process Credit Notes efficiently and without errors
- ▶ View and Email Student Statement (pdf)
- ▶ View Staff version of Student Statement with additional information

## The Benefits

*“UEL now has a coherent view of Student Fees both from a Student and a Staff perspective. Student statements are available from different landscapes – SCJ or SCE. Changes to student fees which are inevitable can be actioned and calculated rapidly so there is no delay or confusion for the student. From a staff perspective the amount of time spent actioning changes has been reduced and so enables staff to deal with more student enquiries”* **Kathryn Digby, Finance Systems Manager, UEL**

*“Previously, my team had to manually process all fee transactions and adjustments for the thousands of students that pass through the University each year. Now, Stu3 have provided us with their Fees Manager tool running on the e:Vision platform, tailored to our needs, which we can use to easily manage and maintain students’ fees, while leaving the heavy lifting to the new fee calculation rules which Stu3 have fully automated in the background. This allows fee adjustments to be system-led and frees-up huge swathes of time for my staff, enabling them to focus their efforts and resources on other tasks. Needless to say, my team and our colleagues in other departments absolutely love the new product, and are looking forward to the innumerable benefits that it is certain to bring over the course of the next academic year and every year thereafter. I’ve thoroughly enjoyed working alongside the team at Stu3, and hope to work with them again on another project in the not-too-distant future.”* **Gregory Horswell-Lilley, UEL Student Records Manager**

## **Working on the project with Stu3**

*“UEL entrusted our long-awaited SITS Fees Process Re-engineering project to Stu3. The consultation process was extremely thorough, and the initial proposal was delivered in a timely manner. Communication was excellent throughout and initiation and development were soon underway. UEL’s specific needs were accounted for and guidance and advice provided whenever necessary in order to achieve best practice. Development and deployment were delivered within the estimated time frames even with the added difficulties that COVID-19 presented the whole project. The Stu3 Team were all amenable and extremely easy to work with and UEL would have no hesitation in calling on them again for future projects.”*

**Kathryn Digby, Finance Systems Manager, UEL**

*“Over the last year I have worked with Stu3 on overhauling the fees-related systems and processes at the University of East London. The team at Stu3, Dave, Pete and Ian, have been fantastic. At every stage, from the project’s initiation to its final completion, Stu3 have been there to guide and support us. Stu3 were key to the collaborative effort required for the project, working closely with the project Business Analyst, Systems Registrar and the inhouse development team as well as business stakeholders to bring about this substantial change at UEL.*

*By bringing a wealth of knowledge and experience to the project they have helped shape, as well as build and implement, their product ‘Fees Manager’, the first of its kind at UEL.”* **Gregory Horswell-Lilley, UEL Student Records Manager**



## Background on Client



**University of East London** is a public university located in the London Borough of Newham, London, England, based at three campuses in Stratford and Docklands, following the opening of University Square Stratford in September 2013. The university's roots can be traced back to 1892 when the West Ham Technical Institute was established. It gained university status in 1992.

Let's chat.

STU3 LIMITED  
EVERGREEN HOUSE NORTH  
GRAFTON PLACE  
LONDON NW1 2DX

OFFICE HOURS  
MONDAY - FRIDAY  
9AM - 6PM

CONTACT  
CONTACTUS@STU3.CO.UK  
020 3305 8443