


COHEAO Presentation
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Training Your Successor to be Successful



Beatrice T Martinez, Director
Student Business Services
Adams State University
Alamosa, CO 81101

ALAMOSA, COLORADO

- Population 10,000
- 220 miles South of Denver
- 30 miles away from the New Mexico border
- Claim to fame: coldest spot in the nation



SAN LUIS VALLEY

- World's largest alpine valley
- Average altitude, 7500 feet
- Valley floor is desert, but ringed by majestic mountains
- Claim to fame: Great Sand Dunes National Monument



ADAMS STATE UNIVERSITY

- Small state supported university
- Approx. 2500 on-campus students, undergrad and graduate programs
- Recent enrollment high of 3700, online graduate programs and 1 PHD program/counseling
- Extended Studies department serves approximately 12,000 students





STUDENT BUSINESS SERVICES

- ▶ Collect and receipt university revenues
- ▶ Assess tuition and fees for both undergraduate and graduate programs
- ▶ Student accounts and third party billing
 - ▶ Online billing
 - ▶ Private Scholarships
 - ▶ College Opportunity Fund (unique to Colorado)
- ▶ Financial aid
 - ▶ Disburse and refund to students
 - ▶ Counsel students and parents regarding financial aid, requirements, and other resources

STUDENT BUSINESS SERVICES CONTINUED

- ▶ All aspects of Collections, including Perkins Loan
- ▶ 3 staff members
 - ▶ Bennie, 18 years
 - ▶ Greg, 11 years
 - ▶ Lillian, 4 months





COHEAO - Coalition of Higher Education Assistance Organization

“For more than 35 years, COHEAO has served as the industry’s premier partnership of colleges, universities and organizations dedicated to promoting the Federal campus-based loan programs and addressing the most pressing issues in student financial services today.”





ONBOARDING AND ACCESS TO TOOLS & TECHNOLOGY

- ▶ ONBOARDING & ACCESS to all the tools and technology to begin the job can take days, weeks, or months to accomplish
- ▶ Back in the day all new employees needed:
 - ▶ Keys
 - ▶ Telephone
 - ▶ Paper & Pencil
 - ▶ Columnar tablets
 - ▶ 10 key adding machine, if you worked with numbers



ONBOARDING AND ACCESS TO TOOLS & TECHNOLOGY CONTINUED

- ▶ KEYS

- ▶ Does your employer have a policy regarding keys?
- ▶ What is the policy?

- ▶ Telephone

- ▶ Does employee need an authorization code to place long distance calls?

- ▶ Others???

- ▶ Picture ID Card
- ▶ Business Cards
- ▶ Name Tags
- ▶ Purchasing Card
- ▶ Travel Card
- ▶ Company Apparel



ONBOARDING AND ACCESS TO TOOLS & TECHNOLOGY CONTINUED

- ▶ HUMAN RESOURCES
 - ▶ Schedule time
 - ▶ Hopefully before employee starts
 - ▶ Performance Planning & Evaluation (employee)
- ▶ HR generates the employee's ID number
 - ▶ The ID number gives the employee access to:
 - ▶ Computer login, general computer use
 - ▶ Email
 - ▶ Banner Self-Service
 - ▶ Shared Drive



ONBOARDING AND ACCESS TO TOOLS & TECHNOLOGY CONTINUED

REQUIRED TRAINING

- ▶ FERPA (Family Educational Rights & Privacy Act)
 - ▶ Complete and pass training to gain access to ERP
- ▶ Credit Card Training
 - ▶ PCI compliance

Don't Forget

- ▶ BUDGET
- ▶ Performance Planning & Evaluation (for those supervised)



ONBOARDING AND ACCESS TO TOOLS & TECHNOLOGY CONTINUED

OFF CAMPUS OPERATIONS

- ▶ COF College Opportunity Fund
 - ▶ Specific to Colorado
- ▶ Third Party Services
 - ▶ Student Refunds
 - ▶ Online Payment Gateway
 - ▶ Student Billing
 - ▶ Collection Agencies
 - ▶ Third Party Payment Vendors (ie AIPORTAL used for military billing)
- ▶ Online Access
 - ▶ Banking to transfer funds, upload files, and balance files

THE ERP – ENTERPRISE RESOURCE PLANNING SYSTEM CONTINUED

- ▶ Basic & Advanced Training
 - ▶ Navigation
 - ▶ Forms
 - ▶ Processes
 - ▶ Jobs
 - ▶ Work Orders
- ▶ Hands on Training
- ▶ Upgrades and Testing






CROSSTRAINING



Willingness



Skills and
Ability



Availability

- ▶ Define the most critical aspects of your job.
- ▶ Don't underestimate the time and commitment needed for successful training!



DOCUMENTATION AND ORGANIZATION – DATA, DATA, DATA IT'S EVERYWHERE.

- ▶ Now where did I put it?
 - ▶ Network files
 - ▶ Personal
 - ▶ Shared files
 - ▶ Calendar with network locations
 - ▶ Be sure to add footer to document
 - ▶ Dates and who was present for meeting notes
 - ▶ Save emails which document processes

- ▶ DOES ANYONE HAVE ORGANIZATIONAL TIPS TO SHARE?

CUSTOMER SERVICE

- ▶ Diversity
- ▶ Respect and Dignity
- ▶ The Difficult Customer
- ▶ Student Business Services Philosophy
 - ▶ Student Success
- ▶ Walk the campus



WHO YOU GONNA CALL?

GHOSTBUSTERS!



- Resources at ASU
- Resources from another school
- CAASLAR (Colorado Association of Student Loans & Accounts Receivable)
- COHEAO
- NACUBO
- Partners at Collection Agencies



LESSONS LEARNED

“

When you see some people work, you wonder what they will do in retirement.

”

- Unknown Author

Bea, are you ready to retire?



“

I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

”

- Maya Angelou




“

If you don't know what to do with many of the papers piled on your desk, stick a dozen colleagues' initials on them and pass them along. When in doubt, route.



”

- Malcolm S. Forbes, businessman



“ God grant me the serenity to
accept the things I cannot change,
the courage to change the things I
can, and the wisdom to know . . .
when to shut up. ”

- Unknown Author



What are your stories or
lessons learned?



Thank you