

USD One Stop Student Center

Before and After

Today's Topics

- A little about USD
- Life before the one stop
- The decision process
- Creation – virtual and physical
- Life after the one stop – results, successes, & lessons learned

University of San Diego



- Private, Catholic Liberal Arts University
- Total Enrollment: 8300 students
 - 5490 undergraduates
 - 1525 graduate students
 - 1285 law students
- 90% retention for our fall 2012 freshmen return rate – a new high

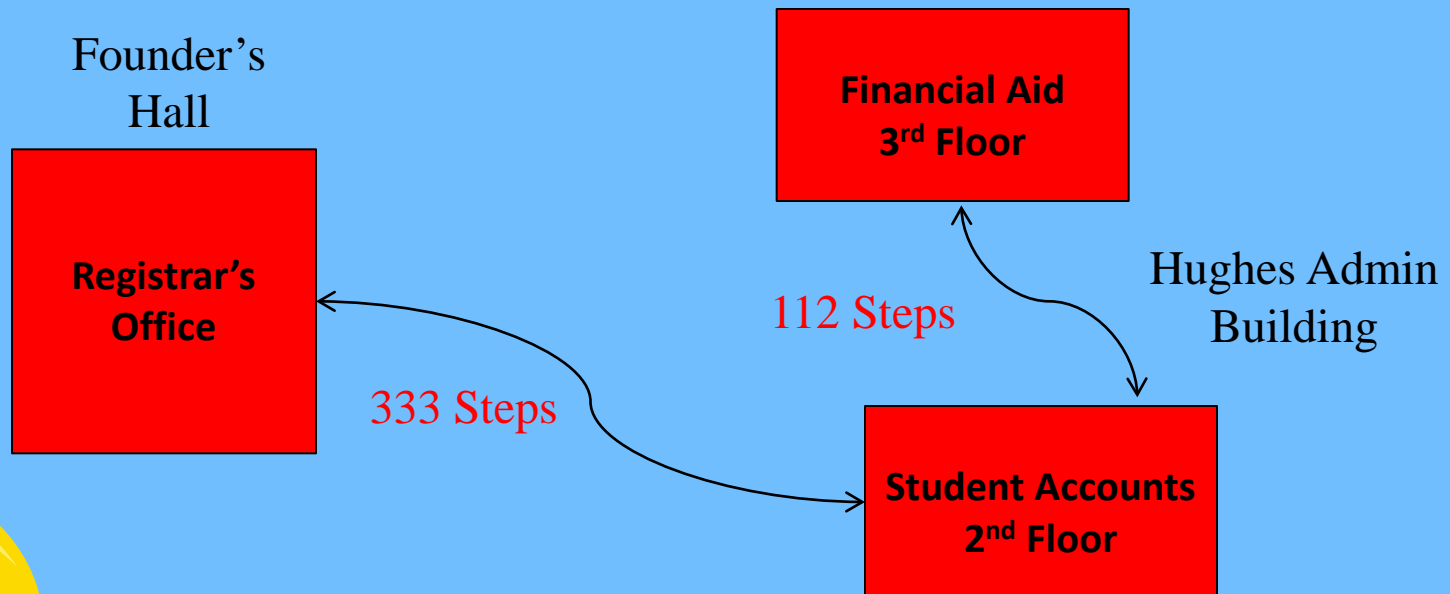


The “Before” Picture

- Three separate home offices (Financial Aid, Registrar, and Student Accounts)
- Located in two separate buildings and separate floors
- Each office provided their own walk-in and telephone customer service
 - Students waited in three separate lines
 - Students felt they got the “run around”
 - Customer service was inconsistent

The Transcript Example

Students walked many steps to request a transcript



Students ready to stage a tea party



Research for answers

- Conducted extensive student survey
- Focus groups
- Senior engineering project
- Formed a one stop task force
- Visited other one stops and attended ISSP conference



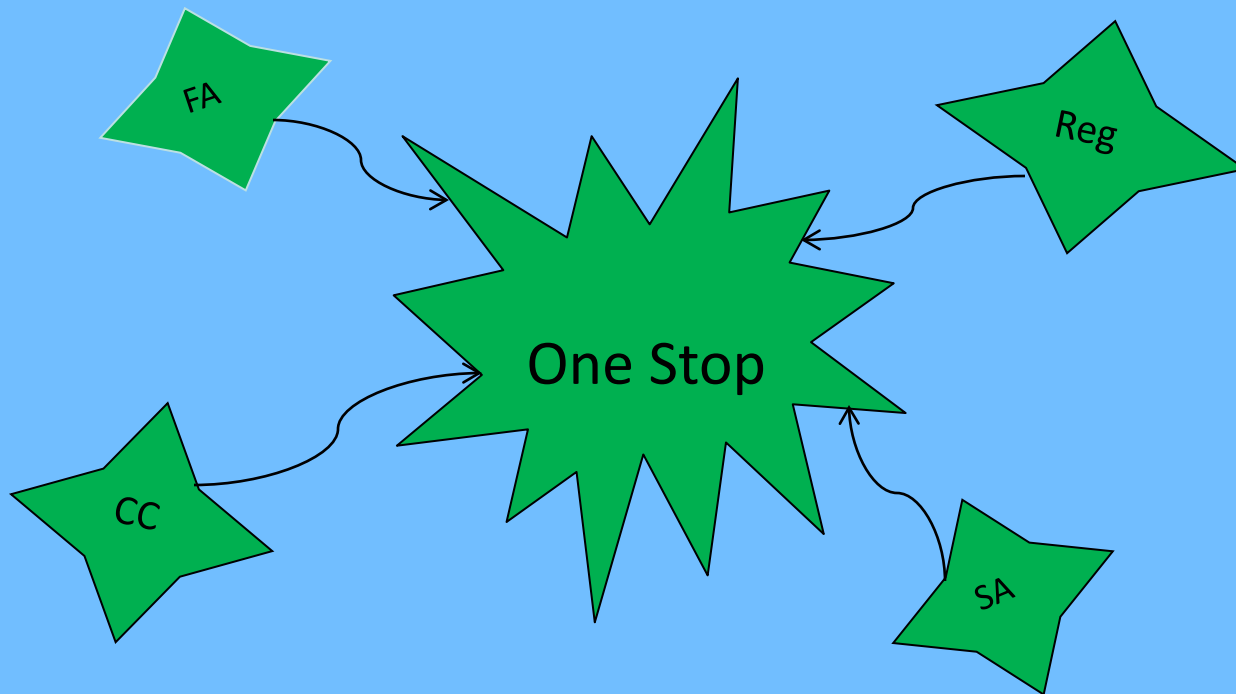
Task Force Recommendations



- One Stop should be in the Provost division
- Include functions of Registrar, Financial Aid, Student Accounts, Special Sessions, and Campus Card Services
- Virtual one stop must become an immediate priority
- Set service goal of 80% online & 20% in office; of the 20%, 95% served completely & 5% referred to home offices
- Fund the One Stop positions by shifting budget for service positions from home offices to the one stop
- Implement and utilize an imaging system



A One Stop concept is born



Timelines to Opening Day



Date	Goal
August, 2006	Hire One Stop Director
April, 2007	Virtual One Stop go-live
December, 2007	Staff interviewed and selected
February, 2008	Staff training begins
May, 2008	Banner go-live
August, 2008	Physical One Stop opens

Virtual One Stop

- Went live in May, 2007
- Established a One Stop Services tab on our portal using the Luminus portal product (Ellucian/Banner)
- Adopted slogan: “Save time – go online where you are always first in line!”
- Contains such routine services as:
 - Make payments, enroll in payment plans, and view bills
 - View and accept financial aid
 - Monitor financial aid status
 - Order official transcripts and print an unofficial version
 - Manage registration of classes and monitor academic progress

Virtual One Stop



SunGard Higher Education - Microsoft Internet Explorer provided by University of San Diego

http://my.sandiego.edu:tag:5bb362ce6223267f.render.userLayoutRootNode:uP7uP_root=root&uP_param=activeTab&activeTab=u2134601d138uP_param=frm&frm=

Q-MATIC Suite CASHNet SunGard Higher Educat... X

Welcome Welcome Required Steps Connect with USD One Stop Services Academic Resources Student Life Grad Life Library Xtender Teach/Advise Employee My Personal Info August 19, 2011

My Student Account

My Student Account

There are no holds on your account

Click [My Online Student Account](#) to

- View my account
- View my bill
- Make a payment
- Enroll in Payment Plan
- Enroll in eRefund (Direct Deposit)
- Authorize a Parent to view and pay my account
- FAQ about student accounts

If you are experiencing any problems with your account and/or unable to pay your student account, please contact onestop@sandiego.edu immediately. If you are receiving a message stating "You are not authorized to access this page," please try clearing your cache/temporary internet files on your web browser.

Message Ticker

Fall balance

My Financial Aid

My Financial Aid

Financial Aid Status

2011-12 Academic Year

You have unsatisfied [student requirements](#) for this aid year.

Your estimated [cost of attendance](#) is \$39,474.00.

You have been [awarded](#) financial aid which totals \$39,474.00.

You have active [messages](#)

[Understanding your financial aid award 2011-2012](#)

Term: 2011-12 Academic Year

Submit

My Electronic Signature Authorization

You have not been awarded/accepted a Perkins Loan and are not required to authenticate your signature at this time.

My TITLE IV Authorization

I authorize the university of San Diego to pay miscellaneous charges on my student account with my Title IV financial credits. I reserve the right to cancel this authorization at any time in writing, and any cancellation is not effective until received by the Office of Student Financial Services

First Name: Tiffany
Last Name: Nakamura
Banner ID: 004032926

Your Title IV authorization was processed on 27-AUG-08

My Registration

My Registration

My Grades

No Data Found

Select Another Term Go

Academic Records Tools

- [View Transcript Holds](#)
- [Final Grades](#)
- [Unofficial Transcript](#)
- [Request Official Transcript](#)

Registration Tools

- [Registration Status](#)
- [Look Up Classes](#)
- [Add or Drop Classes](#)
- [Active Registration](#)
- [Concise Student Schedule](#)
- [Detailed Student Schedule](#)

[Important Registration Planning Information](#)

For technical issues with online registration contact the Help Desk at 619-260-7900 (x7900) or help@sandiego.edu.

For issues with prerequisites, holds or other functional issues contact the One Stop Student Center at onestop@sandiego.edu. Your USD ID# must be included in all email questions.

Financial Aid Requirements

2011-12 Academic Year

Requirements	Fund	Source	Term	Status
Federal Direct Graduate PLUS Loan Form	Fed Direct Grad PLUS Loan			
Federal Direct Subsidized Loan Application	Fed Direct Subsidized Loan			
Federal Direct Subsidized Loan Application	Fed Direct Unsubsidized Loan			
Entrance Loan Counseling	Fed Direct Grad PLUS Loan			✓
Entrance Loan Counseling	Fed Direct Subsidized Loan			✓
Entrance Loan Counseling	Fed Direct Unsubsidized Loan			✓

Free Application For Federal Student Aid
Student Analysis Follow Up #2
Student Income Certification Form

Choose Another Year Go

[Messages](#) [Holds](#) [Financial Aid Status](#)

My Registration Info

- When can I register for Fall 2011?
- Student Waitlist Procedures (new!)
- Fall 2011 Final Exam Schedule
- Spring 2011 Final Exam Schedule
- Degree Audit Report System (DARS) for students

Trusted sites | Protected Mode: Off

Creating the One Stop Team

- Hiring philosophy: Hire the heart, train the brain
 - The innate willingness to serve students is more difficult to find than the necessary intelligence
 - Interview questions designed to seek out student-centric staff
 - Looked for the ability to make decisions in the gray area
- This would be the single most important step in creating the one stop operation



Training

- New One Stop staff still needed in their current positions in the home offices until July 1 (new FY)
- Designed 6-month schedule for training
 - Limited training to half days
 - Rotated OS staff every two weeks among home offices
 - Rotated training pairs so everyone worked with every member of the staff to form relationships and a team attitude
- Held each counselor accountable for their own training; did not have luxury of blaming poor trainers
- Held bi-weekly staff meetings to adjust training and to cultivate team spirit





One Stop Opens

- Office opened on August 8, 2008
- Operating hours: Mon-Fri 9:00 a.m. to 5:00 p.m., open until 6:00 every Wednesday
- Imaging technology used to view home office documents
- Most forms submitted by students to one stop office; no paper records in the one stop office
- Each counselor is empowered to handle any transaction
- Goals: 80% online and 20% in office; 95% completely served in one stop and 5% referred to home office; 90% of these are to the office of financial aid

Physical Office Space



- Welcome desk greets students as they enter office
 - Staffed by executive assistant and student employees
 - Quick transactions performed here
- Longer transactions are checked into the queue
- In our lobby:
 - Seating for waiting customers and self-help computers
 - Flat screens display students called from queue; also display TV programs to alleviate any waiting time
- Partitioned offices offer visual privacy but not audio





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EQUUS 155/5110



Kim Cam

Serving

Steve

Reception K

1 and time: 11:00am 9-14-11

SONY

What We Do

- All front line processes of the three home offices
- Accept payments
- Other atypical processes performed:
 - Student account special payment arrangements
 - Limited academic counseling using DARS
 - Housing & meal plan assistance
 - New Veteran Students Coordinator position
- Strive for the absolute best customer service possible
 - Customer service is a significant part of every discussion
 - Part of annual evaluation; ongoing training



Successes

- Extensive training worth the pain - each counselor is equipped to handle 95% of questions with unparalleled customer service
- Team approach has been successful in minimizing stress and burnout among the staff
- Location a gift from the one stop gods
- Staff meetings provide excellent opportunity to discuss processes, continue training, and cultivate team spirit
- Students are ecstatic at solving so many issues in one place!





Lessons Learned

- More time should have been devoted to mapping current processes to make them more student-centric
- Organizational structure – all offices report to same person?
- Is co-location really necessary? We thought so at first.
 - We are more independent and less likely to refer to home office
 - Very difficult to find physical space for all four offices
 - The effect on the home offices of not seeing students
- Avoid implementing an ERP system at the same time
 - We implemented portal, Banner, and did extensive training – on two administrative systems!



Lessons Learned

- Relationships with home offices require a positive attitude, maturity, and excellent collaboration
 - As the new kid on the block, home offices can naturally be territorial. Be ready to respect and work with that.
 - If hiring from the home offices for budgetary reasons, be prepared for disappointment by those not selected
- Fully address all communication issues
 - Phones, emails, website, Facebook, etc.
 - Staff accordingly – phones and emails can add 3-4 positions
- If new to the campus, look deep to fully understand the campus culture – student-centrism, acceptance, etc.



Lessons Learned

- Consider taking payments for convenience of students
- Carefully map the flow of documents between offices
- Be sensitive to the staff's mental & emotional health
 - Possible issues: burnout, frustration, negativity, inconsistency
 - Ways to help: staff meetings, team (we're in this together) approach, humor, creature comforts, outreach opportunities
- Classify counselors as administrators – decision makers
- Obtain all necessary system access in advance
- Virtual one stop limited only by our imaginations
- Do as much outreach as possible across campus

After all is said and done...

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Contact Information

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One Stop Student Center

www.sandiego.edu/onestop

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