

Bursar's Office

Mission

OSU-Okmulgee Business Affairs, Bursar's Office provides the campus with accurate and timely processing of student, employee, and external account information through compliance with University policies and procedures, State and Federal regulations, and external partnership expectations.

Vision

OSU-Okmulgee Business Affairs Bursar's Office will become a premier Bursar's office and lead in the improvement of providing student account information in an expedient manner.

To accomplish this:

- The Bursar's Office will provide customers with quality service, resources, and methods to accomplish their individual goals as well as the institution's mission.

Core Values

Excellence – We seek excellence in all our endeavors, and we are committed to continuous improvement.

Intellectual Freedom – We believe in ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge.

Integrity – We are committed to the principles of truth and honesty, and we will be equitable, ethical, and professional.

Service – We believe that serving others is a noble and worthy endeavor.

Diversity – We respect others and value diversity of opinion, freedom of expression, and other ethnic and cultural backgrounds.

Stewardship of Resources – We are dedicated to the efficient and effective use of resources. We accept the responsibility of the public's trust and are accountable for our actions.

Goals, Critical Success Factors, Objectives, and Strategies

Goal One. Enhance the campus smart card system to improve secure and efficient transfer of information to customers.

Critical Success Factors:

- SmartCard information provided each term as requested by students
- SmartCard reconciled to SCT each term

Objectives:

Objective 1.1: Provide students with detail listing of Smart Card purchases at Cashier's window.

Strategies:

- Provide students with Smart Card transaction reports for review as needed.
- Show students how to read their Smart Card transaction reports.

Objective 1.2: Ensure Smart Card accounts are in agreement with SCT.

Strategies:

- Review SmartCard accounts and report issues to Accounting Services.
- Review Crystal reports data from ChipNet3.
- Review Focus reports data from SCT.
- Compare reports to locate any differences.
- Correct differences to complete reconciliation.
- Provide training of personnel in the correct way to enter transaction to keep systems reconciled.

Goal Two. Enhance the transfer of information through electronic means.

Critical Success Factors:

- Employee billings transferred electronically by June 30, 2004
- Scholarship billings transferred electronically by June 30, 2005
- Contract billings transferred electronically by June 30, 2006
- External third party billings transferred electronically by June 30, 2007
- EFT refunds option offered to students by June 30, 2004

Objectives:

Objective 2.1: Utilize the Universities electronic system to provide students with electronic billings.

Strategies:

- Use electronic means whenever possible to transfer information on and off campus to expedite transfer.
- Promote Web4Students to students on a regular basis at cashier's window.
- Send billings and statements via e-mail in place of paper.
- Provide information and training to students receiving information on how to retrieve information.
- Provide clear and concise directions on OSU-Okmulgee's website for students to use Web4Student as the main source for billing account information.
- Provide computer access to students at the Cashier's window for self-help issues relating to their Bursar account.

Objective 2.2: Utilize electronic system to support a paperless office environment.

Strategies:

- Store student receipts electronically.
- Scan documents to store electronically.
- Use e~Print to verify information without printing when appropriate.
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Objective 2.3: Process student refunds by EFT

Strategies:

- Inform students of opportunities to receive refunds by EFT in lieu of paper check.
- Promote EFT by offering an incentive to the first 50 students to sign up for EFT each semester.

Goal Three. Assure successful operations and business continuity by developing and implementing relevant policies and procedures consistently across the campus.

Critical Success Factors:

- Policies and procedures documented by December 31, 2004
- Policy documentation updated annually

Objectives:

Objective 3.1: Develop and Implement Bursar's Office policies in a consistent manner.

Strategies:

- Document directions for all processes.
- Assure that all policies relevant to the Bursar's office are consistent.
- Provide appropriate instructions to areas affected by policy.
- Provide training to personnel in areas needed to assure policies and procedures are implemented in a consistent manner.

Goal Four. Develop and maintain effective processes to ensure the protection of University assets and sufficient accounting controls.

Critical Success Factors:

- Vault cash verified daily
- Cash drawers verified in Bursar's office daily
- 6 unscheduled cash verifications per year of change funds housed outside of the Bursar's office
- Aged accounts receivables sent to collection monthly
- TouchNet Cashiering Solutions implemented by December 31, 2004
- "30-60-90 day billing" process reviewed annually
- BR Subcodes revised to utilize BBB315 for Contract billing by December 31, 2004

Objectives:

Objective 4.1: Ensure the cash is accounted for and sufficient accounting controls exist.

Strategies:

- Document processes for proper handling of cash.
- Develop Focus reports to extract data from SCT system to track cash resources.
- Utilize reports to assure that University assets are managed in an effective manner.
- Perform surprise cash verifications for cashiers by Bursar to ensure accuracy.
- Implement new institution wide processes for receipting of cash.
- Provide training to appropriate personnel in areas needed to ensure cash resources are handled properly.
- Maintain cash records in a consistent manner.
- Verify that all cash records are in accordance with University policies and procedures.

Objective 4.2: Reduce aged accounts receivables by sending 30-60-90 day billing letters and utilizing BBB315.

Strategies:

- Use FOCUS to identify aged receivables over 120 days and process to collections.
- Coordinate with Accounting Services the proper coding needed to utilize BBB315 for contract billing.

Objective 4.3: Implement TouchNet Cashiering Solution.

Strategies:

- Coordinate implementation on the OSU-Okmulgee campus with OSU-Stillwater staff.
- Test and reconcile applications of the system.
- Provide training to necessary personnel in the use of TouchNet.

Goal Five. Promote a cohesive teamwork atmosphere by proactively sharing student information with students and other areas.

Critical Success Factors:

- Guidelines established for sharing student information by December 31, 2004
- Training on guidelines provided by June 2005
- Yearly training sessions on relevant changes concerning student information

Objectives:

Objective 5.1 To share student information with students and other offices as laws permit.

Strategies:

- Provide training to office staff on allowable information that may be released by phone.
- Develop consistent ways to verify identity of caller before releasing information.
- Develop tracking of information provided.

Goal Six. Maintain records in accordance with University accounting controls to ensure audits meet institution and system standards.

Critical Success Factors:

- Required information provided for external audit of accounts receivable information yearly
- Required information provided to OSU main campus yearly
- Required information provided to OSU internal auditors yearly
- Required information provided to Oklahoma State regents for Higher Education Regents Office yearly

Objectives:

Objective 6.1: Provide the annual external auditors of the University, requested information relating to Cash and Accounts Receivables necessary to support an opinion without material misrepresentation.

Strategies:

- Provide training to Bursar personnel to properly post transaction to student accounts.
- Use appropriate software to prepare reports for student's monthly statements.

Objective 6.2: Provide student bursar account information required by OSU main campus for external auditors.

Strategies:

- Develop Focus reports to extract the appropriate data needed for auditors.
- Review information for reasonableness test compared to prior years.

Objective 6.3: Provide student bursar account information required by Oklahoma State Regents of higher Education.

Strategies:

- Develop Focus reports to extract the appropriate data needed for Oklahoma State Regents of Higher Education.
- Review information for reasonableness test compared to prior years.