



Student Financials Student Billing

Student Financials Product Advisory Group



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This is a publication of the Higher Education User Group, Inc. (HEUG) and was prepared by the Student Financials Product Advisory Group and the Billing Workgroup. It is offered in the spirit of professional sharing among higher education PeopleSoft users with the goal of helping them better understand the past, current and future situation with respect to billing functionality offered by Oracle Corporation for higher education users Campus Solutions. While it may include statements about the HEUG's interpretation of Oracle's intent or product development plans, many factors can materially affect the nature and timing of Oracle's product releases. This document is based on discussions of the Student Financials Product Advisory Group and the billing work group, and the members of that group have validated the information contained herein to the extent they can. Our intention is to provide an accurate picture of our current understanding of the state of product and service offerings from Oracle, but the HEUG accepts no responsibility for any decisions made based on information contained in this document.

Thus, as a condition of your reading and using our Student Financials Student Billing White Paper, we require that you agree to the following: In no event will you hold the Higher Education User Group, Inc. or its officers, directors, employees, agents, or volunteers responsible for any decision made by individual institutions in their respective planning processes made after reading the information contained herein. Each institution's situation is unique, and must be evaluated within its own context.

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TOPIC Student Financials Student Billing

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1. BUSINESS JUSTIFICATION AND NEED

1.1. BUSINESS JUSTIFICATION

The proposed changes and added functionality to the billing process will greatly enhance the ability of schools to provide excellent customer service and improved communications to students and their delegates. It will also improve gaps in the delivered functionality of the student billing process and allow schools to remove or reduce the number of customizations, as well as their dependence on external vendors for bill presentment. This would save some schools tens of thousands of dollars per year.

1.2. CURRENT SOLUTION / GAP

Within PeopleSoft Campus Solutions, standard, delivered functionality exists to assign due dates, define billing populations, calculate bills and print the billing statements. As the diversity of institutions grows and technology advances, especially with the demand for real-time, online services, the billing module needs to be more adaptive to meet the needs of all institutions. For institutions and their student populations, billing flexibility is essential to provide enhanced customer service, more accurate billings, and the option to target specific student groups based upon varying criteria. By surveying the HEUG population, schools have identified several gaps in current functionality that could be improved, as well as additional self-service processes that could be created. These areas are identified below and are discussed in greater detail in Section 2 Business Process Overview and Requirements.

2.1 PDF Bills in Self-Service

2.2 Assignment of Due Dates separate from Billing

2.3 Email and SMS Notification of Statements and Due Dates

2.4 Simplify Batch Billing Process:

Billing Populations, Billing Messages and Billing Params

2.5 Guest Access to Self-Service Billing Information



2. BUSINESS PROCESS OVERVIEW AND REQUIREMENTS

2.1. PDF BILLS IN SELF-SERVICE

Business Requirement: Institutions need a delivered solution to produce a PDF bill via self-service, available to both students and guests.

Current Functionality/Gap/Justification:

Currently there is no delivered functionality in Campus Solutions to produce a PDF bill in self-service. There needs to be an electronic way to view bills, print if needed, and go back historically to see past bills, in a safe and secure manner.

In the SF billing survey, 62 of 68 (91%) respondents stated they would maybe, likely or definitely use a PDF bill in self-service. In fact, 31 (46%) of the respondents stated they would definitely use a PDF bill in self-service.

Institutions should not have to invest their own resources to have to customize Campus Solutions to create a PDF bill. Customizations are expensive to create and maintain.

Using an outside vendor adds complexity and expense to the billing process. The University of Minnesota recently developed a custom process to internally produce a PDF bill. Prior to doing so, they were spending around \$100,000 a year to pay a vendor for the service. Northwestern University paid a vendor just over \$30,000 for fiscal year 2012 to provide electronic/PDF bills.

The SF billing survey indicated over 38% (26 of 68) of schools use outside vendors. Significant dollars could be saved by these institutions by providing this function within Campus Solutions.

If Campus Solutions could provide a delivered PDF version of the bill in self-service, it will reduce the number of customizations schools have, reduce the need for future customizations and result in large dollar savings for schools that have partnered with vendors to provide a PDF version of the bill.

Specifications:

The PDF version of current and previous bills should be available as part of a seamless financial process of seeing the amount due, viewing the PDF bill, and paying the bill. When viewing/printing previous bills, it is critical that it display the exact content as it did when originally generated. For Global Invoicing, this would be based on Invoice_ID.

Desired enhancements would:

- Leverage XML Publisher functionality for creating PDF bills.

- Create stock queries of billing data.
- Create a few templates for presenting PDF bills that end users could easily adapt to their needs.

2.2 ASSIGNMENT OF DUE DATES SEPARATE FROM BILLING

Business Requirement:

Provide a process separate from billing that will assign due dates to non-tuition assessed transactions. This can also be described as extending Due Date calendars to non-assessment charges. The process also needs to allow users to assign due dates based on more targeted criteria to better meet various business needs.

Current Functionality/Gap/Justification:

While the current functionality to assign due dates was clearly identified from the survey as being widely used, the spread of results indicates that institutions have a range of business needs that are not being met by the current configuration options. While the current billing process does allow you to choose a due date or due days for all transactions, greater flexibility to assign due dates based on charges not paid, charge types, student characteristics and critical dates such as census dates (for Australian customers) were requested.

Null due dates were identified as causing a number of customizations to be built to populate the due date field with a valid due date. The typical null due date of 1/1/2500 is confusing to students in self-service.

The ability to initially assign, reassign and review due dates by student cohorts or identifiable groups was requested. Keeping track of these due date changes would also be required.

If there was some logic that could be invoked to assign due dates when transactions are written, then we wouldn't have null due dates or perhaps even the need a batch process.

Specifications:

Provide a separate process to assign due dates independent of the billing process:

- Extend Billing and Due Date Calendar functionality
 - In addition to term based due date calendars, allow effective dated due date calendars (keyed by due_date_code and effdt).
- Add a couple more fields to the list of potential pivot dates:
 - orig_eff_dt (from item_sf)
 - item_effective_dt (from item_line_sf)
 - census date



- Require due_date_code on all charge item types. Posting would look up the due date based on due_date_code.

The assignment of due dates could be based on rules to ensure there was no overlap when assigning the date.

We also need to consider the situation where a charge is reversed or a payment made, to result in a new due date being assigned which is not immediately past due.

2.3 EMAIL AND SMS NOTIFICATION OF STATEMENTS AND DUE DATES

Business Requirement:

To enhance customer service and adopt current business standards, it would be beneficial to allow students and delegates to elect to receive email and/or SMS alerts of recent statements and upcoming due dates.

Current Functionality/Gap/Justification:

Within PeopleSoft Campus Solutions, there is no delivered functionality for sending out email or SMS notifications of billing or due date reminders to either students or delegates. When surveying the HEUG population, this particular question scored very favorable as far as the desire for this enhancement, with 80% stating they would definitely or likely use this feature.

Specification:

It would be helpful if within PeopleSoft Campus Solutions there was a run control page with a process attached that would identify the populations that had a bill due date approaching, and what that date was. This run control page could be created with multiple selection criteria such as term, session, career, program/plan, transaction due date, invoice due date (Global Invoicing), or academic population. Depending on the criteria you choose, the process would trigger a query to gather the information needed for the email notifications. Bundle 27 introduced some self – service functionality called Using Self Service for Delegated Access. This contains a section on Creating a Proxy and Delegating Access to the Proxy. Part of this process involves entering the proxy's email address, which could be useful as the framework when querying for the email notification that would go to the proxy. It needs to include verification that the student has authorized the proxy to access billing data though, to be sure emails are not sent to proxies that students did not say could see the billing information.

2.4 SIMPLIFY BATCH BILLING PROCESS: BILLING POPULATIONS, BILLING MESSAGES AND BILLING PARMS

**Business Requirement:**

Create a process for batch billing similar to batch tuition calc. Allow students to be sorted into billing groups based on criteria, and process multiple bill groups in a single batch.

Current Functionality/Gap/Justification:

Billing standard requests (BSR) allow users to define specific billing populations, but they can only be processed one at a time, resulting in a laborious effort where students are processed more than once or not at all. One of the loudest complaints about the billing business process is how long it takes because you have to run bill batches sequentially. The request envisions sorting all students into their correct population, then processing each student bill according to the rules of that population.

Over 75% of the institutions surveyed expressed interest in the ability to create billing population criteria similar to tuition calculation. The survey also included over a 60% interest in the ability to define billing populations to exclude, for example financial aid. The options to bill populations by career, program, and plan also garnered a 60% interest.

The proposed enhancements would dramatically increase the flexibility available to institutions to identify, categorize, and target specific billing populations.

Specification:

1. Extend criteria functionality to include billing criteria
2. Ability to create billing batches by combining population, messages and processing parms
 - a. Population criteria (analogous to tuition groups)
 - i. Reuse current BSR functionality geared towards population selection:
 1. Not Billed Since
 2. Institution/Campus
 3. Service Impact
 4. Academic Selections
 - a. Include/exclude if
 - i. Enrolled in specified term
 - ii. Career/Program/Plan/Status
 - iii. Academic Group, Residency, Load, Level
 5. Student Groups
 6. Enrolment Blocks
 - ii. New population selection attributes
 1. Financial Aid recipient

2. First Bill of Term
- iii. Extend pop select functionality
 1. Allow users to create Student Groups (or stand-alone Bill Groups, not necessarily integrated with Student Group functionality)
 2. Develop sample/generic queries to populate Student/Bill groups.
- iv. See Appendix A: Create IU Billing Request Population
- b. Messages relevant to the population
 - i. Specify which conditional messages (e.g. item type messages) to use
 - ii. Specify any global messages (user defined) to use
 - iii. See Appendix B: Create IU Billing Request Messages
- c. Processing parms relevant to the population
 - i. Address usage
 - ii. Include anticipated aid
 - iii. Print options
 1. Small debit or credit balance
 2. Zero balance
 3. Balance forward only
 4. Only if no email address
 - iv. Invoice Options
 - v. Scan Line
 - vi. Print Schedule of Classes
 - vii. Create Communication Records
 - viii. Account Selections
 - ix. Messages
 - x. See Appendix C: Create IU Billing Request Parms
3. Ability to process multiple bill batches simultaneously. The process would select all students for a given Institution/Campus, and for each one,
 - a. Assign them to the correct bill batch based on population (analogous to tuition groups)
 - b. Create their bill based on the messages and processing parms of that bill batch
 - c. See Appendix D: Generate Invoice

2.5 GUEST ACCESS TO SELF-SERVICE BILLING INFORMATION

Business Requirement:



Student has the ability to invite a third party/guest to access his/her billing information in self-service. This option can be enabled or disabled by the system administrator within the self-service configuration.

Current Functionality/Gap/Justification:

Currently, the system does not offer the functionality for a third party/guest to access a student's billing information in self-service. In a recent survey of the Student Financials Listserv Community, the majority of respondents were in favor of granting third party/guest access to student billing information. When asked if the respondents would use this functionality if it was made available, the respondents indicated: 47% Definitely; 10% Likely; 29% Maybe; 7% Unlikely; and 7% Never.

The goal of any business, including educational institutions, is to collect payment for outstanding debts as soon as possible. Student accounts are frequently paid by a third party (e.g. a family member, employer, or government agency). In many cases, a third party will not pay a student's tuition and fees without evidence of student's enrollment and charges.

Enabling the third party/guest to access detailed student billing information will reduce the time that it takes for the college staff/student to provide this information to the third party and thereby expedite the payment process altogether.

Specification:

The student should have the ability to invite a third party/guest to have access to his/her billing information.

This functionality should be configured within the application for a college to activate/inactivate the ability for students (as an aggregate whole or student population) to grant third party/guest access to student bill information.

The third party/guest will be notified with the following information:

- Student has granted the third party/guest access to view student billing information
- URL to the Self-Service Third Party/Guest Access Login Page
- Credentials (e.g. username and password) to access Self-Service Third Party/Guest Pages – password must be sent in a secure fashion, per the requirements of each institution.

The ultimate goal would be that guest access communication is automated and require minimal or no intervention by the student and/or college staff.



3. DOCUMENT INFORMATION

3.1 DOCUMENT PARTICIPANTS

This document was developed and/or reviewed by:

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Members of the Student Billing Working Group

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3.2 REVISION HISTORY

Change Date	Change by	Changed Section(s)	Document Change
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2/25/2013	Shelly Currin		Incorporates oral and written revision suggestions from committee members
3/11/2013	Ken Pattillo		Major editing modifications prior to SF PAG review at Alliance summit 3/15-16.
6/11/2013	Ken Pattillo		Final consolidation and editing

3.3 RELATED DOCUMENTS



4. Appendices

4.1 APPENDIX A: CREATE IU BILLING REQUEST POPULATION

Favorites | Main Menu > Student Financials > Bill Customers > Student Bills > Create IU Billing Request

Enrollment | Messages | Params

Business Unit: IUBLA Billing Request Nbr: 935 Request Status: Available

Billing Request Description: KEN EXAMPLE

☒ Include Only Students Enrolled in: 4132

Include Careers (leave blank if all) Personalize | Find | View All | 1 of 1 | First | Last

Enrollment Term	Academic Institution	Academic Career	Academic Program	Academic Plan	First Bill
4132	IUBLA				<input checked="" type="checkbox"/>

☒ Exclude Any Students Enrolled in:

Exclude Careers Personalize | Find | View All | 1 of 1 | First | Last

Enrollment Term	Academic Institution	Academic Career	Academic Program	Academic Plan
4132	IUBLA	GRD1		

☒ Include Only Students In Group:

Include Groups Personalize | Find | View All | 1 of 1 | First | Last

Academic Institution	Student Group	Description
IUBLA		

☒ Include Only These Students:

Include Students Personalize | Find | View All | 1 of 1 | First | Last

ID	Name

Save | Return to Search | Previous in List | Next in List | Refresh | Add | Update/Display

Enrollment | Messages | Params



4.2 APPENDIX B: CREATE IU BILLING REQUEST MESSAGES

Navigation: Favorites | Main Menu > Student Financials > Bill Customers > Student Bills > Create IU Billing Request

Enrollment | Messages | Params

Business Unit: IUBLA Billing Request Nbr: 935 Request Status: Available

Include Messages

<input checked="" type="checkbox"/> Show Business Unit Messages	<input checked="" type="checkbox"/> Show Past Due Message	<input type="checkbox"/> Show Emplid Messages
<input type="checkbox"/> Show Service Indicator Messages	<input type="checkbox"/> Show Aging Category Messages	<input checked="" type="checkbox"/> Show Item Type Messages

Messages Find First 1-2 of 2 Last

*Message Number	Message Text:
9	Account is subject to a late payment fee of 1.5% per month with a \$2.00 minimum if the amount due is not received in the office by the due date.
20	Payments which require special processing (529 plans, scholarships, overnight mail) must be mailed directly to the Poplars (E. 7th St.) address.

Buttons: Save | Return to Search | Previous in List | Next in List | Refresh | Add | Update/Display

Enrollment | Messages | Params



4.3 APPENDIX C: CREATE IU BILLING REQUEST PARMS

Navigation: Favorites | Main Menu > Student Financials > Bill Customers > Student Bills > Create IU Billing Request

Enrollment | Messages | **Parms**

Business Unit: IUBLA Billing Request Nbr: 935 Request Status: Available

Billing Request Details

Due Date/Days

*Invoice Date: 02/11/2013 [calendar icon]

☒ Due Date: 03/10/2013 [calendar icon]

☐ Due Days: [text box]

Address Usage: B/A/L [magnifying glass icon]

Billing, Student Home, Local

Include Anticipated Aid?: ☒

Offer Personal Deferment?: ☒ Contract Number: 19872 [magnifying glass icon] 4132 Spring 2013 Third Deferment PDO Msg Nbr: 1

Personal Deferment Option: If you pay the exact Minimum Due by the due date, the balance will be deferred until next month's due date for a \$15 fee.

Suppress Bill Options

Suppress Bill Export If:	Paper	Web
Debit Bill less than	0.00	0.00
Zero Bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Bill	<input type="checkbox"/>	<input type="checkbox"/>
Balance Forward Only Bill	<input type="checkbox"/>	<input type="checkbox"/>
Paper Duplicate of Web Bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: Save | Return to Search | Previous in List | Next in List | Refresh | Add | Update/Display

Enrollment | Messages | **Parms**



4.4 APPENDIX D: GENERATE IU INVOICE

Favorites | Main Menu > Student Financials > Bill Customers > Student Bills > Generate Invoice

Generate Student Bills

Run Control ID: BILLING_REQUEST [Report Manager](#) [Process Monitor](#)

*Business Unit: Bloomington

Bill Request ID: STUDENT BL Student Bill

Process Student Billing Requests							Personalize Find View All First 1 of 1 Last	
*Run Order	Billing Request Nbr	Bill Req Descr	Invoice Date	Enrollment Term	PDO Contract			
1	935	KEN EXAMPLE	02/11/2013	4132	19872			

4.5 APPENDIX E: RESULTS FROM THE SF USER SURVEY

Background Information

1. What Campus Solutions (CS) version are you on?

(free form answers)

2. Multi-institutional?

49	72.06%	No
6	8.82%	Yes, but billing is handled centrally
13	19.12%	Yes, each campus runs its own billing
=====		=====
68		Total

3. Which types of students are at your institution?

65	28.63%	Traditional undergraduate/graduate residential
44	19.38%	Fee paying/government loan



6	2.64%	Traditional community college
59	25.99%	International students
19	8.37%	Medical school
9	3.96%	Predominately online/correspondence
25	11.01%	Executive or corporate education
=====		=====
227		Total

Due dates: Does your institution

1. Use delivered Billing and Due Date Calendar functionality for assigning due dates to assessment (tuition calc) related charges?

18	26.47%	No
48	70.59%	Yes, as delivered
2	2.94%	Yes, customized
=====		=====
68		Total

2. Assign due dates to non-assessment (tuition calc) charges that are posted via group post?

27	39.71%	No
38	55.88%	Yes, as delivered
3	4.41%	Yes, customized
=====		=====
68		Total

3. Use the billing process to assign due dates to any remaining charges with a null due date?

23	33.82%	No
44	64.71%	Yes, as delivered
1	1.47%	Yes, customized
=====		=====
68		Total

4. Use the delivered self service "Charges Due" page?

32	47.06%	No
30	44.12%	Yes, as delivered
6	8.82%	Yes, customized
=====		=====
68		Total



5. Use the delivered self service "Student Center" page, which has a box for displaying current due and future due?

27	39.71%	No
24	35.29%	Yes, as delivered
17	25%	Yes, customized
=====		=====
68		Total

6. Use the delivered SQL/views in the calculation of the due and past due values displayed in self service?

31	45.59%	No
30	44.12%	Yes, as delivered
7	10.29%	Yes, customized
=====		=====
68		Total

7. Run the delivered "Item Due" Report in Table Validation?

43	63.24%	No
25	36.76%	Yes, as delivered
0	0%	Yes, customized
=====		=====
68		Total

8. Run the delivered Credit History process?

27	39.71%	No
33	48.53%	Yes, as delivered
8	11.76%	Yes, customized
=====		=====
68		Total

9. Use the delivered late fee functionality?

59	86.76%	No
5	7.35%	Yes, as delivered
4	5.88%	Yes, customized
=====		=====
68		Total

10. Use the item line adjustment functionality in collections to override due dates?

53	77.94%	No
----	--------	----



15	22.06%	Yes. Please explain:
=====		=====
68		Total

11. Have a customization to replace null due dates

67	98.53%	No
1	1.47%	Yes. Please explain:
=====		=====
68		Total

Student Billing: Does your institution

1. Send paper bills?

27	39.71%	No
10	14.71%	Yes, all
31	45.59%	Yes, some
=====		=====
68		Total

2. Produce electronic bills?

15	22.06%	No
53	77.94%	Yes. Please explain (PS self service, comm gen, vendor, etc.)
=====		=====
68		Total

3. Send email notification of bills or due dates?

14	20.59%	No
10	14.71%	Yes, delivered
28	41.18%	Yes, customized
16	23.53%	Yes, external vendor
=====		=====
68		Total

4. Use an external vendor for "bill presentment?"

42	61.76%	No
26	38.24%	Yes
=====		=====
68		Total



5. Use delivered functionality (billing standard requests) to bill different populations?

32	47.06%	No
29	42.65%	Yes, delivered
7	10.29%	Yes, customized
=====		=====
68		Total

6. Include anticipated aid in bill presentment, when applicable?

30	44.12%	No
18	26.47%	Yes, delivered
20	29.41%	Yes, customized
=====		=====
68		Total

7. Offer a deferred payment option?

25	36.76%	No
17	25%	Yes, delivered
8	11.76%	Yes, customized
18	26.47%	Yes, external vendor
=====		=====
68		Total

8. Use service indicators to suppress billing?

26	38.24%	No
37	54.41%	Yes, delivered
5	7.35%	Yes, customized
=====		=====
68		Total

9. Use student groups?

23	33.82%	No
40	58.82%	Yes, delivered
5	7.35%	Yes, customized
=====		=====
68		Total

How Likely would you be to use the following innovations?
(1 = Never, 2 = Unlikely, 3 = Maybe, 4 = Likely, 5 = Definitely)



1. PDF Bills in self service:

3	4.41%	1 - Never
3	4.41%	2 - Unlikely
15	22.06%	3 - Maybe
16	23.53%	4 - Likely
31	45.59%	5 - Definitely
=====		=====
68		Total

2. Process that assigned due dates separate from billing (extending Due Date calendars to non-assessment charges):

11	16.18%	1 - Never
14	20.59%	2 - Unlikely
20	29.41%	3 - Maybe
14	20.59%	4 - Likely
9	13.24%	5 - Definitely
=====		=====
68		Total

3. Email notification of due dates:

2	2.94%	1 - Never
4	5.88%	2 - Unlikely
17	25%	3 - Maybe
24	35.29%	4 - Likely
21	30.88%	5 - Definitely
=====		=====
68		Total

4. A billing "batch" run control page that processed all students into billing groups, similar to how batch tuition calc sorts students into tuition groups:

6	8.82%	1 - Never
9	13.24%	2 - Unlikely
27	39.71%	3 - Maybe
14	20.59%	4 - Likely
12	17.65%	5 - Definitely
=====		=====
68		Total

5. SMS billing/due date reminders:



10	14.71%	1 - Never
6	8.82%	2 - Unlikely
23	33.82%	3 - Maybe
18	26.47%	4 - Likely
11	16.18%	5 - Definitely
=====		=====
68		Total

6. Ability to bill and bury (mark transactions that sum to \$0 as billed):

7	10.29%	1 - Never
9	13.24%	2 - Unlikely
14	20.59%	3 - Maybe
20	29.41%	4 - Likely
18	26.47%	5 - Definitely
=====		=====
68		Total

7. Guest access to self service billing information:

5	7.35%	1 - Never
4	5.88%	2 - Unlikely
20	29.41%	3 - Maybe
7	10.29%	4 - Likely
32	47.06%	5 - Definitely
=====		=====
68		Total

8. (A) Ability to assign due dates by term:

6	8.82%	1 - Never
10	14.71%	2 - Unlikely
23	33.82%	3 - Maybe
13	19.12%	4 - Likely
16	23.53%	5 - Definitely
=====		=====
68		Total

8. (B) Ability to assign due dates by Session:

13	19.12%	1 - Never
15	22.06%	2 - Unlikely



18	26.47%	3 - Maybe
10	14.71%	4 - Likely
12	17.65%	5 - Definitely
=====		=====
68		Total

8. (C) Ability to assign due dates by career (student):

19	27.94%	1 - Never
21	30.88%	2 - Unlikely
17	25%	3 - Maybe
3	4.41%	4 - Likely
8	11.76%	5 - Definitely
=====		=====
68		Total

8. (D) Ability to assign due dates by class start date:

18	26.47%	1 - Never
17	25%	2 - Unlikely
17	25%	3 - Maybe
7	10.29%	4 - Likely
9	13.24%	5 - Definitely
=====		=====
68		Total

9. (A) Ability to define billing populations by sessions:

19	27.94%	1 - Never
11	16.18%	2 - Unlikely
22	32.35%	3 - Maybe
9	13.24%	4 - Likely
7	10.29%	5 - Definitely
=====		=====
68		Total

9. (B) Ability to define billing populations by career/program/plan (e.g. executive education):

16	23.53%	1 - Never
10	14.71%	2 - Unlikely
18	26.47%	3 - Maybe
15	22.06%	4 - Likely



9	13.24%	5 - Definitely
=====		=====
68		Total

9. (C) Ability to define billing populations by different address priorities (local address vs. home address):

26	38.24%	1 - Never
21	30.88%	2 - Unlikely
12	17.65%	3 - Maybe
2	2.94%	4 - Likely
7	10.29%	5 - Definitely
=====		=====
68		Total

9. (D) Ability to define billing populations by first bill of term:

18	26.47%	1 - Never
8	11.76%	2 - Unlikely
18	26.47%	3 - Maybe
13	19.12%	4 - Likely
11	16.18%	5 - Definitely
=====		=====
68		Total

9. (E) Ability to define billing populations by transaction due date:

24	35.29%	1 - Never
13	19.12%	2 - Unlikely
18	26.47%	3 - Maybe
8	11.76%	4 - Likely
5	7.35%	5 - Definitely
=====		=====
68		Total

9. (F) Ability to define billing populations by populations to exclude, for example financial aid:

14	20.59%	1 - Never
12	17.65%	2 - Unlikely
15	22.06%	3 - Maybe
18	26.47%	4 - Likely
9	13.24%	5 - Definitely
=====		=====



68 Total

10. Ability to create billing population criteria similar to tuition calc criteria:

11	16.18%	1 - Never
6	8.82%	2 - Unlikely
24	35.29%	3 - Maybe
18	26.47%	4 - Likely
9	13.24%	5 - Definitely
=====		=====
68		Total