

PROACTIVE APPROACHES TO STUDENT SOLUTION IMPROVEMENTS IN THE OFFICE OF THE REGISTRAR



Your Presenters

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- Associate Registrar for Operations
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- Oversight:
 - Academic Calendar
 - Academic Advisement Reporting Tools & Degree Conferral
 - Enrollment Systems
 - Operations
 - Transfer & Alternative Credit Articulation & Entry

LYNDSEY OLIVER-FAREWELL (SHE/HER)

- Associate Registrar for Student and Faculty Support, Office of the Registrar
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- Oversight:
 - Student Solutions Team (Customer Service)
 - Scheduling, Grading & Faculty Support
 - Communications
 - Transcripts
 - Enrollment & Bio/Demo Processing

University at Buffalo (UB)

- Founded 1846
- Largest institution in the State
University of New York (SUNY) System
- \$1.7B annual budget
- 3 campuses
- 13 schools and colleges with over 500 programs
- 20,359 undergraduate students
- 11,544 graduate/professional students
- Employ 3,144 staff and 2,889 faculty



Office of the Registrar

- University Registrar: Kara Saunders
- 3 Associate Registrars
- 1 Associate Coordinator for Instructional Facilities
- 2 Assistant Registrars
- 15 Professional Staff
- 3 Clerical staff
- 5 Graduate Assistants



Systems at UB

- PeopleSoft Campus Solutions 9.2
 - System branded as HUB
 - Went live with PeopleSoft in 2011
- Slate for Admissions System
- EAB Navigate for Student Success and Advising System
- SUNY/Homegrown for HR System
- Perceptive Content for document management

TO-DO



2 To Dos

MANAGE CLASSES



ACADEMIC PROGRESS



GRADES / AWARDS



BILLING / PAYMENTS



FINANCIAL AID / SCHOLARSHI...



PROFILE



Key Areas of Focus

- Prior customer service model
- Culture shift and office goals
- General philosophy: creating capacity for change with tools and process improvements
- Student Solutions team



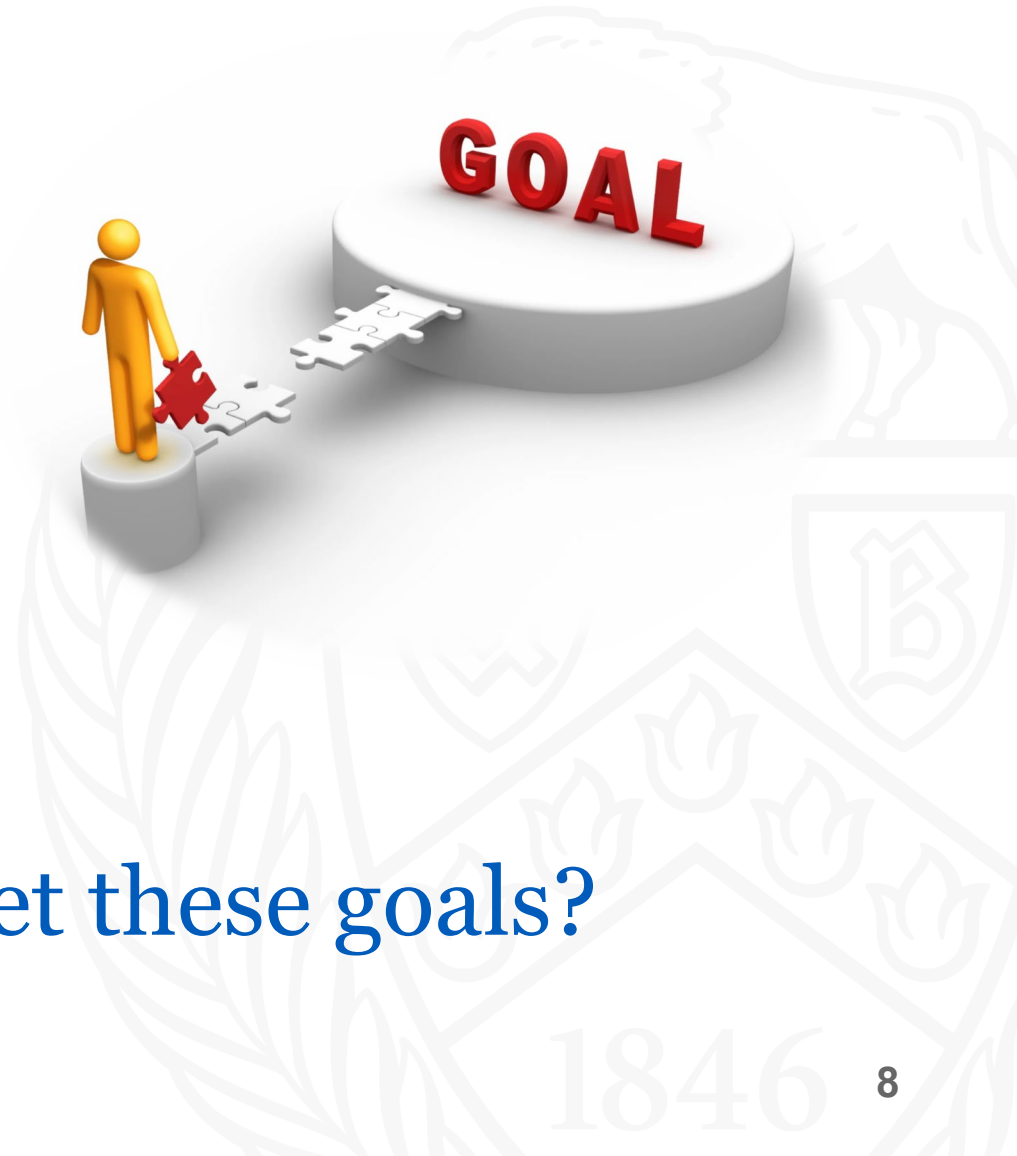
Prior Customer Service Model

- Service focused on quick answers and handling as many calls as possible
- Insufficiently staffed to regularly assess and improve service
- Non-customer service staff regularly assisting on phones
- Misplaced talents
- Phone volume: 29,442 calls handled (2017/18)



Goals

- Streamlined service
 - Less internal call transfers
 - Reduce the “UB Bounce”
- Focusing of Responsibilities
 - Staff in roles that fit their strengths and interests
- Develop a Student Solutions team
- Reduce phone calls, emails and in person traffic



How do we create capacity to meet these goals?

General Philosophy



Proactive service



Reduce barriers

accept email requests, only
require signatures when
necessary, flexibility with
deadlines



Automate processes



Strategic staffing



Providing easy to use tools and resources

Communications

- Enrollment text message campaign
 - Text message reminder to undergrad students' day prior to their scheduled enrollment apt.
- Non-degree prerequisite outreach
- HUB CommGens
 - Degree conferral name & address
 - Automated enrollment



Leveraged Available Tools

- Formstack
 - Removed signatures when possible
- Box: Secure document upload center
- Adobe Digital ID rather than wet signatures
- Microfilm scans for improved legacy processing
- SmartPanda OCR transcript entry (Raptor)



Collaborative Tool Development



S/U grade request and retrieval portal



Automated Academic Term Withdrawal



Academic Review Appeal Portal



Departmental force registration/exception registration



Transfer Articulation Request System (TARS)



University at Buffalo

School of Engineering
and Applied Sciences

Indirect Communication



Website content

Improved content
Faculty/staff content
and job aids



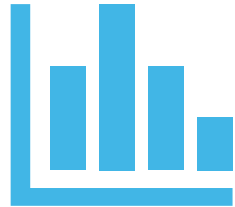
Improved phone menu



Revamped HUB guides



Improved Processing Times



Leveraged & improved SIS Data/Queries

Dean's List processing
Academic review



Degree Audit Automation

Leverage AAR, PS queries and degree checkout statuses through Graduation Processing to batch automate degree audit & conferral

- OOR oversight of 7k degree conferrals annually
- Team of 3

STUDENT SOLUTIONS TEAM



Student Service Mission

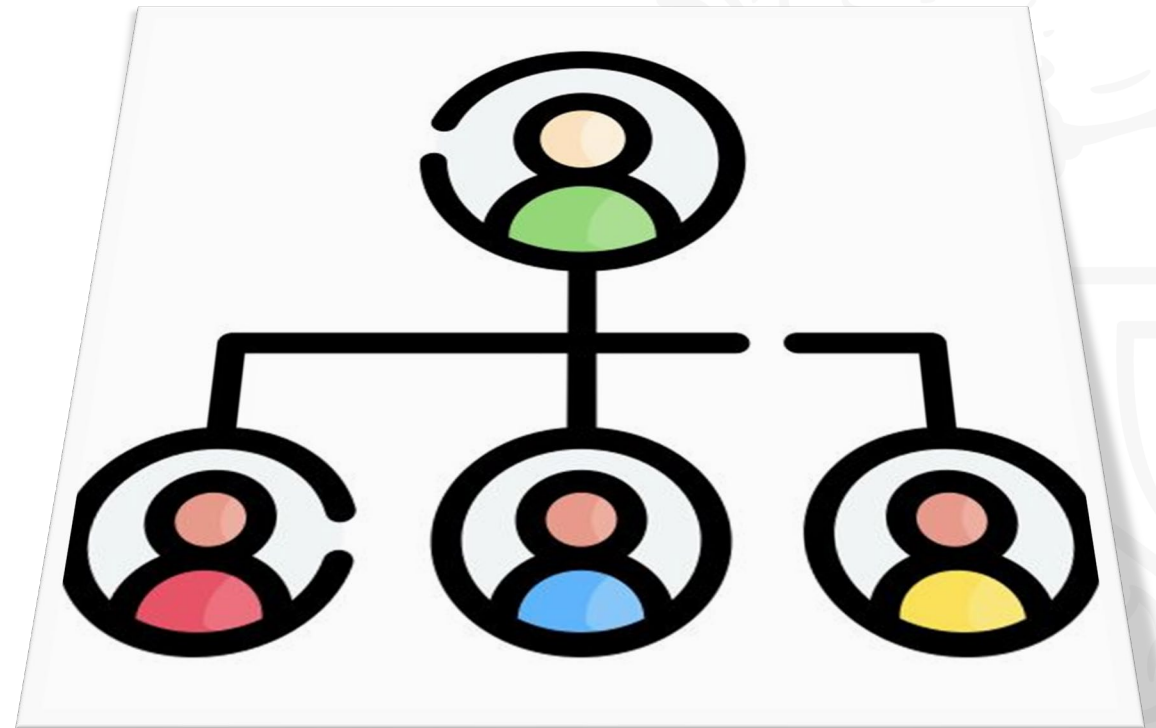
THE OFFICE OF THE REGISTRAR IS COMMITTED TO A STUDENT-CENTERED APPROACH WITH A COMMITMENT TO PROVIDING HIGH-QUALITY SERVICE, SUPPORTING THE NEEDS, SUCCESS AND ACHIEVEMENTS OF STUDENTS AND THOSE WHO SUPPORT THEM, INCLUDING FACULTY, STAFF, PARENTS AND FAMILY MEMBERS.

Student Service Goals

1. Engage in a student centric approach to our work, consistently considering the impact on our students, while acknowledging that student needs and desires must be balanced with the academic and compliance needs of the institution as well as our financial and personnel realities.
2. Proactively anticipate student needs through holistic review and intervention.
3. Every interaction is an opportunity to educate students, raising their awareness of available resources and empowering students to use those resources. With each interaction, we seek to help students navigate the university for the current situation and into the future.
4. Ensure that every caller/emailer feels heard, supported, and connected to UB.
5. Reduce “UB Bounce:” Whenever possible, assist from question to solution
6. Provide support in a pleasant and professional manner
7. Maintain a consistent approach to student service throughout all interactions
8. Resolve problems and answer questions in a non-judgmental, timely fashion and in the best interest of those we serve.
9. Maintain compliance with all University, Office of the Registrar and SUNY policies and procedures. Communicate policies and procedures in a clear and effective way
10. Evaluate our procedures and communications on a regular basis and make improvements whenever possible

Team Structure

- Oversight: Associate Registrar for Student and Faculty Solutions
- 4 professional staff
 - 1 Coordinator
 - 3 in-person specialists
- 1 clerical staff
- 4 graduate assistants



Team Responsibilities



In-Person Coverage

1 Capen
1 Diefendorf



Phone Coverage



Email



Chatbot Training and Maintenance



Processing

Bio/demo related updates
Enrollment and degree verifications
Leave of absence and leaving UB
Non-degree (traditional non-degree, cross registration and 60+ auditors)

Team Development

- Staffing
- Training and professional development
 - Onboarding plan
 - Monthly, scheduled professional development
 - Small team meetings
- Expanded customer service resources
- Team chat
- Standard escalation paths



Success: By the Numbers

- 28% lower call volume – 8,283 less calls
- 37% reduction in emails sent
- Additional staff – overall office growth



Thanks for Coming!

- Questions
- Contact:

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