



Back to Basics Workshop Agenda Student Accounts Receivables



Session Logistics	Student Accounts Receivables (AR) Workshop
Session Date	October 23, 2018 (Tuesday)
Location	TBD
Participants	Student AR staff and leadership, IT staff supporting Student AR
Facilitators	Kimberly Saving-Sherman, Senior Consultant, Banner Student & AR Specialist Tim Woltering, Senior Consultant, Process Specialist
Session Requirements	<ul style="list-style-type: none">• 2 large Post-It Flip Chart pads, stands, markers, & wall space to post charts• Name tents for participants• Projection system for PowerPoint presentation and access to Banner Test

Tuesday 10/23	Student AR Best Practices
8:30-8:45 am	Welcome and Introductions
8:45-9:15 am	Review of Survey Data
9:15-12:00 pm Break 10-10:15	High Level Business Process Review and Identify Opportunities for Improvement <ul style="list-style-type: none">• Topics (<i>order presented and discussed may change</i>):<ul style="list-style-type: none">○ Third-Party Contracts○ Detail Codes○ Billing, Payment, Collections: Student enrolled current term○ Billing, Payment, Collections: Student not enrolled current term○ Refunding○ Fee Assessments Maintenance Prioritize Opportunities and Identify 'Quick Wins' Confirm Topics for Consulting in the Afternoon
12:00-1:00 pm	Lunch
1:00-4:15 pm Break 3-3:15	Student AR Consulting Topics TBD
4:15-4:30 pm	Review Accomplishments and Wrap-up