**Session Logistics**

<table>
<thead>
<tr>
<th>Session Date</th>
<th>Student Accounts Receivables (AR) Workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>October 23, 2018 (Tuesday)</td>
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<tr>
<td>Participants</td>
<td>TBD</td>
</tr>
<tr>
<td>Facilitators</td>
<td>Student AR staff and leadership, IT staff supporting Student AR</td>
</tr>
<tr>
<td></td>
<td>Kimberly Saving-Sherman, Senior Consultant, Banner Student &amp; AR Specialist</td>
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<tr>
<td></td>
<td>Tim Woltering, Senior Consultant, Process Specialist</td>
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**Session Requirements**

- 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

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**Tuesday 10/23**

<table>
<thead>
<tr>
<th>Time</th>
<th>Student AR Best Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-8:45 am</td>
<td>Welcome and Introductions</td>
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<tr>
<td>8:45-9:15 am</td>
<td>Review of Survey Data</td>
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</table>
| 9:15-12:00 pm | High Level Business Process Review and Identify Opportunities for Improvement
|             | Topics *(order presented and discussed may change)*:                                    |
| Break 10-10:15| o Third-Party Contracts                                                                    |
|              | o Detail Codes                                                                           |
|              | o Billing, Payment, Collections: Student enrolled current term                           |
|              | o Billing, Payment, Collections: Student not enrolled current term                       |
|              | o Refunding                                                                              |
|              | o 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  | Student AR Consulting                                                                     |
| Break 3-3:15  | Topics TBD                                                                               |
| 4:15-4:30 pm  | Review Accomplishments and Wrap-up                                                       |