



Boston College
Office of Student Services
2016–2017 Annual Report

Academic Services

General Services

Student Accounts, Receivables,
and Operations

Undergraduate and Graduate
Financial Aid and Student
Employment

Communication

Student Information Services

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Appendix

Introduction

In fall 2016 undergraduate enrollment reached a record high of 9,309 students; economics was again the largest major/concentration ever recorded; and finance was again the largest concentration recorded in the Carroll School of Management. Biology, computer science, and mathematics witnessed the largest number of majors recorded, while nursing and political science were at 25 year highs. The introduction of new proximity cards involved close attention at the start of the academic year to ensure student safety and access to their residence halls and rooms.

The implementation of the financial aid system continued with the addition of the work study module, although ongoing issues and testing continued throughout the year. Testing simultaneously continued for the state grant and institutional awards modules. The financial aid cycle start-up took place earlier in preparation of the October 1 release of the FAFSA and the use of prior-prior year tax returns, which resulted in an increase in early or on time completed financial aid applications. A new Embark application platform was launched for the graduate schools and the Woods College.

In October new computers were installed for all staff members with many opting for a laptop and docking station. Planning for the offload of Devlin Hall during construction of the undergraduate admission office and admission visitor center continued.

uAchieve was selected as the new degree audit system, introductory training took place in December, and advanced training took place March. Staff members from Core and the Carroll School of Management participated in training and coding of requirements.

Meanwhile, the student account team continued its development of the student account system, and the enrollment team continued to identify system requirements. Self-study teams concluded their work for the successful NEASC reaccreditation visit in March.

In April outreach to high need students contributed to an enrollment increase of Pell eligible students. A new eSyllabus system developed in Canvas was released to the BC community. Louise Lonabocker's retirement was announced. To end the fiscal year in May, the student account receivables for the tenth consecutive year were under \$1 million. In June summer registration was relocated to Gargan Hall for one year, a new version of curriculum management was moved to production, and "light provisioning" was introduced to students, which allows them to share current courses and course history with third parties.

In addition to the new initiatives, regulatory compliance, technology projects, and enrollment highlights noted previously, other accomplishments for the past year include:

- Met with BC schools and colleges to identify all majors, minors, concentrations, specializations, and certificates in preparation for EagleApps configuration.
- Prepared a data classification spreadsheet for IT Security.
- Participated in the development of a real-time financial aid transactional database for troubleshooting and caseload management.

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- Implemented batch awarding for incoming and returning graduate students, reduced manual effort, and provided more timely award notifications.
- Implemented for student employees the Massachusetts Earned Sick Time Law and the increase in the Massachusetts minimum wage.
- Witnessed a decrease in service contacts by automating cross-registration for Boston Theological Institute students and moving undergraduate day school registration for Woods College courses to the Woods College.
- Prepared student services annual reports and minutes of the Academic Officers Council for transmission to the archives.
- Celebrated Successful Start's tenth year and Number 14 rating in LendEDU's top colleges for financial literacy.
- Monitored National Student Clearinghouse and NSLDS websites to ensure accurate data and achieved an impressive 98.83 percent certified rate.
- Completed online admissions implementation for the Woods College of Advancing Studies, with financial aid ongoing.
- Scanned a record number of exam sheets in the fall semester and upgraded Remark software to the latest version.

As noted above, the past year marked many significant accomplishments, and additional details are contained in the pages that follow.

In the year ahead, we look forward to the implementation of new financial systems and a range of initiatives including the following:

- Implement the new student account system and prepare and include a financial responsibility statement for students.
- Complete the implementation of the Massachusetts state grant and institutional awards modules, develop financial aid report writing capabilities, and complete financial aid integration with student accounts.
- Automate Pell grant reconciliation.
- Monitor graduate student unionization efforts.
- Complete fit/gap analysis and test functionality and data conversion for EagleApps course offerings, enrollment, and academic records.
- Complete coding of degree audit requirements and support the transfer admission module.
- Select a new 1098-T vendor, test, and implement the change.
- Create functionality to allow online deposits for graduate admissions.
- Prepare to implement new academic policies including Latin honors and registration for summer session courses.
- Contribute to the upgrade of the person system.
- Continue to support efforts to improve data in the Enterprise Data Warehouse (EDW), convert to Cognos 11, and create custom reports in Cognos.
- Explore TMetrics functionality for incorporating e-mail, chat, and PCI solutions.
- Support the planning for a new Customer Relationship Management system.
- Maintain security, classification, and marking of sensitive data, analyze vulnerabilities, and recommend mitigating strategies.
- Purge electronic documents according to retention of records schedule.

- Evaluate opportunities for distribution and receipt of secure electronic transcripts.
- Support innovative programming at the graduate level.
- Monitor and prepare for regulatory changes.
- Accommodate Lyons elevator replacement during winter break.
- Improve federal compliance oversight.

Louise Lonabocker
Executive Director

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Student Services Staff

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HUMAN RESOURCES, PROFESSIONAL DEVELOPMENT, AND ADMINISTRATION

For a complete organization chart, see Appendix I.

New Staff

Pamela Cugini-Giatras, Student Support Specialist
Elissa Krasner, Student Service Associate
Roz Leshin, Financial Aid Assistant, Law School
James McCarron, Student Support Specialist

Staff Resignations

Uche Kevin Anidi, Student Support Specialist
Meaghan Hardy Smith, Support Analyst
Jack Irwin, Student Service Associate
Louise Lonabocker, Executive Director
Craig Noyes, Direct Loans/Collection Specialist
Terry Rezzuti, Academic Records & Student Employment Specialist
Joyce Wentland, Credit and Collection Associate

Staff Promotions, Status Changes, and Milestones

Caitlin Walsh from Student Service Associate to Academic Records Specialist.
Brennan Harkin and Dan Higgins were promoted to Associate Business System Analysts.
Brian Swenson earned his Ph.D. in Higher Education Administration.
Eriliza Guerrero earned her master's in Higher Education Administration.
Kathy Winarski celebrated twenty-five years at Boston College.

Temporary positions were renewed for Julie Zupan, System Support Analyst (35 hours) and Ursula DellaPorta, Student System Business Analyst (28 hours). Meaghan Hardy Smith was also renewed before accepting a new position at Boston University. These positions will provide added support during the implementation of the student system and as future staffing needs are assessed.

Student Employment

Student employees were hired in various capacities for the fall, spring, and summer terms, including 24 students in the fall, 23 in the spring, and 11 in the summer. All student employees received a welcome packet and a student employment handbook. They were also required to sign confidentiality agreements which are kept on file in the office.

University Service

Student Services' staff served on the following committees and task forces: Academic Officers, Athletic Compliance, Business Continuity, Campus Security Project, Classroom Technology and Development, Commencement, Compliance, Data Security, Devlin Offload, Disability Services, EagleApps, Enrollment Management, Enterprise Data Warehouse, Environmental Health and Safety, Harassment Network, Human Resources Liaison, ITS project review, Martin Luther King, Jr., Memorial Committee, Montserrat Coalition, NEASC Reaccreditation, Online Learning, Operational Data Store, Parking Advisory Council, Retention of Records, Social Media Council, Successful Start Financial Literacy, Veterans Affinity Group, Welcome Week, Women's Collaborative, and various search committees.

Staff members also assisted in training academic advisors, orientation leaders, OTE preceptors, and department administrators, conducted sessions on student employment and FERPA compliance, offered presentations at parent orientations, graduate student events, and Admitted Eagle Days, conducted student loan exit interviews, and served as academic advisors, conversation partners, and notaries public.

Melissa Metcalf joined Bernie Pekala for a presentation on completing the FAFSA for the Employee Development Program.

Greg Keswick and Louise Lonabocker were panelists on flexible workplaces for the Employee Development Program.

Conferences

- Linda Malenfant, NERCOMP Conference
- Mary McGranahan, 568 President Group /Need Analysis Council
- Joyce Mappes, Mary McGranahan, Melissa Metcalf, 2016 NASFAA National Conference
- Meaghan Hardy Smith, Joyce Mappes, Mary McGranahan, Sigma Users Conference 2016
- Kara Deckard, Linda Malenfant, Derek Michaels, Nick Rendon, NASFAA Overview of Student Financial Aid Programs
- Kathy Rosa, 2016 Student Loans and Receivables Collection Conference
- Kara Deckard, Nick Rendon, College Board Financial Aid Workshop
- Linda Malenfant, NASFAA Cash Management 1610 Conference (online)
- Anthony Raymond, MN Collection Network Mega Conference XXIV

- Kathleen McGuinness, 2nd Annual Mental Health Matters Conference: Building A Resilient Campus
- Members of the Financial Aid Staff, MASFAA 2016 Conference
- Deb Aaron, Angelica Fisichella, Mary McGranahan, Melissa Metcalf, 2016 FSA Training: Conference for Financial Aid Professionals
- Kathleen Rosa, SLRC Conference
- Twenty staff members, Massachusetts Conference for Women 2016
- Jenna Brown, Introduction To SQL, Brookline Adult ED
- Marsia Hill Kreaime, Elaine Holloman, MASFAA 2017 GPCC Symposium
- Kathleen McGuinness, Clearing House Academy
- Melissa Metcalf, Brian Swenson, 2017 NASFAA Leadership & Legislative Conference & Expo
- Louise Lonabocker, College Board New England Regional Forum
- Kathy Winarski, Kathleen McGuinness, AACRAO Annual Conference and Jesuit Registrar Meeting (CORE)
- Agnes Jordan, Customer Service Experience
- Greg Keswick, Julie Zupan, NERCOMP Slate Users Group
- Mary McGranahan, 565 Presidents Group Meeting
- Brennan Harkin, 2017 College Source Annual Conference
- Joyce Mappes, NASFAA 2017 Annual Meeting

Additional Training

- Financial aid staff members attended in-house training on federal taxes conducted by Jim Briggs and held a staff retreat in January.
- Student Services' staff attended training sessions offered by Employee Development and ITS.
- The General Services team had an annual retreat in March 2017. Presenters at the Retreat were Jeannette Gerzon and Rita Ghilani. The General Services management team worked with the Office of Employee Development—Organizational Effectiveness in determining the theme and presenters for the retreat which focused primarily on the theme of “Managing Ourselves and Our Communication during Change.”
- Several staff members coordinated activities for Black History month, including electronic updates about Black history.

Professional Development

- Matt Meegan and Karen Livingston participated in the BC Colleagues in Mission program.
- Melissa Metcalf participated in the Susan Vogt Leadership Fellowship program through the Boston Consortium.
- Eriliza Guerrero completed the University Affiliates program.

Professional Service

- Kathy Rosa serves on the HeartlandECSI client advisory board.

Professional Presentations

- Meaghan Hardy Smith offered a presentation on Institutional Methodology at the Sigma Systems conference.
- Melissa Metcalf presented at the Let's Get Ready Program sponsored by the Office of Governmental and Community Affairs at Brighton High School.
- Kathy Rosa offered presentations on student loan collections and borrowers with permanent disabilities at the Williams and Fudge conference in September 2016 and offered "Assisting Students with Managing Debt" at the Pennsylvania Bursar's conference in June 2017.
- Louise Lonabocker spoke to the United Board Fellows, a program that aims to enhance the leadership expertise among higher education administrators in South Asia and Southeast Asia.

University Research

- Various studies were undertaken or queries run to provide decision support for policy and practice related to course enrollment, majors, Core, and classroom utilization. In addition, projections were prepared for undergraduate enrollment and freshman course enrollment.

Professional Visits and Contacts

- Student Services hosted a staff member from Wentworth Institute of Technology interested in academic services and related processes.

CHARITABLE AND VOLUNTEER ACTIVITIES

Holiday Project

For the seventeenth year, Student Services raised money for charity with the office's annual holiday basket drawing. Student Services' staff and the Boston College community donated 26 baskets. Tickets for the drawing were sold to the university community during the month of December, and a total of \$5,048 was raised for children and families from the Greater Boston area.

In addition to the raffle, staff collected soda cans throughout the year, and a total of \$369 was contributed to the holiday project.

Food Drive in Memory of the Great Famine

Student Services partnered with the Boston College School of Social Work (BCSSW) students, faculty, and staff for a food drive in March 2017 in memory of the Great Famine. Student Services donated ten boxes of food that were distributed to food pantries in the Brighton area. In addition, \$200 was donated.

DATA SECURITY

ID Finder is monitored, and staff are notified electronically when incidents appear that have not been resolved. Staff members participated in mandatory data security training.

BUSINESS CONTINUITY

The business continuity plan is stored in the online database provided by the Office of Emergency Management. The plan includes scope of work, critical functions, software applications, vital records, forms, and documents, office support equipment, essential personnel, line of succession, relocation strategy, staff contact list, and a communication plan. Key institutional contacts as well as vendors, service-providers, cross-registration counterparts, and government officials are also included in the plan. Essential supplies for recovery are stored in another on-campus location. In addition, Student Services serves as a support unit to schools and academic departments that may be impacted by the loss of classroom space.

BUDGET

The new Eagle One card proximity cards are significantly more expensive at approximately \$5.00 more than the former cards, which cost approximately \$.50. Funds were added to the operating budget to cover the cost of replacement Eagle One proximity cards based on a volume of 5,200 and a replacement cost of \$25.

For FY18, a request was made to raise the Eagle One card fee to \$35 and the replacement fee to \$30, and transfer \$70,000 to the operating budget.

INTERNAL AUDIT

The Executive Director met with the Director of Internal Audit in the spring to discuss upcoming projects, new initiatives, and areas of greatest risk, including aging systems, compliance, security, and business continuity.

GOALS: PROFESSIONAL DEVELOPMENT

- Submit proposals for three to five presentations at regional and national conferences.
- Encourage three to five staff members to participate on committees at the regional and national level.
- Continue to encourage staff to participate in career development activities locally and nationally within budget.

ENROLLMENT STATISTICS

Enrollment and graduation charts and tables are in the Boston College Fact Book.

Academic Services

The Academic Services team consisted of six full-time and one half-time employees which included: an Associate Director, Academic Services, a Course Administration Specialist, an Academic Progress Analyst, a Academic Records Specialist, an Academic Records & Certification Specialist, and a half-time Student System Business Analyst.

When the Academic Certification Specialist resigned in June 2016, the position was upgraded to an Associate Business Systems Analyst position and reassigned to the Student Information Services team. The transcript processing and diploma printing responsibilities were assumed by the Student Support Services team and all remaining duties were reassigned to members of the Academic Services team. These changes have worked well over the past year.

ACADEMIC POLICY

During 2016–2017, the Academic Officers Council approved the academic policy changes noted below.

- Starting fall 2017, the drop/add period and the pass/fail period will be aligned. There will be no extended pass/fail.
- Latin honors will be based on grade point average for undergraduate students starting with the Class of 2018. The ranges are as follows: summa cum laude 3.9–4.0, magna cum laude 3.8–3.899, and cum laude 3.667–3.799.
- Beginning summer 2018, undergraduate students will be allowed to register for summer courses with a departmental subject code without approval and with courses and grades counting toward graduation requirements. Courses with an AD prefix will be treated as external courses.
- In EagleApps a course flagged pass/fail will be graded pass/fail regardless of the grading policy for the student's home school. If the course will be graded pass/fail, it should be evident in the Course Information and Schedule.
- Ungraded courses will be graded in EagleApps with an S grade (satisfactory) or a U grade (unsatisfactory). If the course carries one credit, and the student receives an S, they will receive credit. If they receive a U, no credit is earned. There is no impact on the GPA for S or U.
- New programs in the pipeline include a Ph.D. in Accounting and an M.S. in Sports Administration starting in 2017, and a Doctor of Nursing Practice starting in 2020.

REGISTRATION

Undergraduate and graduate students continue to register using UIS. Student Services provides student degree audits to undergraduate advisors prior to registration and to law school students.

After a successful launch of core renewal pilot courses in summer 2015, the number of seats available has climbed steadily to over 1,000 for the fall 2017 semester. Demand for these courses to date appears to be in line with the number of seats available, while demand for courses such as Perspectives and Courage to Know remains high. Major interests declared at the time of admission suggested increased numbers of science, economics, and political science majors. Early registration results uphold these trends. Fewer students were offered admission to the

Honors program, which will increase enrollment in other departments. The Romance Language and Literatures department now offers a placement course for Spanish, and students may enroll in elementary or intermediate Spanish I or II.

The Academic Services team supported the Office of International Programs by registering students enrolled in Boston College's programs in a 15-credit holding course and placing those in external programs on junior year abroad or "J" status. The staff registered the exchange students each semester as well as those who participated in summer study abroad programs. The staff e-mailed the registration appointments with access codes to students on study abroad, so they were prepared to register in November and April.

Cross Registration

The cross-registration statistics are included in the following chart.

Cross Registrations

Year	Total Courses Taken Outside Boston College	Total Courses Taken at Boston College	Total Students Outbound	Total Students into Boston College
2012–2013	157	240	143	220
2013–2014	186	175	169	162
2014–2015	221	109	203	98
2015–2016	140	113	174	135
2016–2017	146	100	207	107

ACADEMIC COMPLIANCE FOR STUDENT ATHLETES

The Academic Progress Analyst certified 712 student athletes in the fall and 694 in the spring. The certifications required a thorough review of each academic record to ensure that these students made satisfactory progress towards their degrees according to NCAA rules.

The Academic Progress Analyst reviewed and submitted data to the NCAA for all scholarship athletes for both the Academic Progress Rate (APR) and the Graduation Success Rate (GSR). The latest findings revealed that 11 Boston College sports scored a perfect 1000 on the APR. In addition, the Academic Progress Analyst identified 423 student athletes who were academically qualified for the Atlantic Coast Conference (ACC) Honor Roll.

COMMENCEMENT

The university awarded 4,123 degrees in 2016–2017, which was an increase of 46 from the previous year. A total of 2,369 (57%) were undergraduate degrees and 1,754 (43%) were graduate/professional degrees. The university awarded 1,799 degrees (44%) to men and 2,324 (56%) to women. The gender distribution for undergraduates was 46% male and 54% female, and for graduate students, it was 40% male and 60% female.

The Lynch College of Education awarded its first M.S. degrees in Applied Statistics & Psychometrics. The Morrissey College awarded its first M.A. degrees in Middle Eastern Studies and its first B.A. degrees in Environmental Studies.

- Economics, Communication, and Biology were the most popular first majors for Morrissey College of Arts and Sciences graduates.
- Finance, Marketing, and Accounting were the most popular first majors for Carroll School graduates.
- Applied Psychology and Human Development was the most popular first major for Lynch School of Education graduates.
- Corporate Systems continued to be the most popular major for Woods College undergraduates.
- Thirty-three percent of undergraduates completed a second major, and forty percent of the graduates completed a minor.
- The university awarded 68 degrees to students who completed dual degree programs. The Carroll School of Management—Graduate Programs continued to award the highest number with 38 (9%) of their master’s degrees awarded to students completing dual degree programs. The School of Theology and Ministry awarded 9 degrees, the School of Social Work awarded 9 degrees, the Law School awarded 7 degrees, the Lynch School of Education—Graduate Programs awarded 5 degrees, and the Graduate School of the Morrissey College of Arts and Sciences awarded 1 degree.
- The university awarded 23 canonical degrees.
- A total of 48 students completed accelerated degree programs:
 - Four students completed the B.A./M.S.W. program in the School of Social Work.
 - Four students completed the B.S./M.S. in the Connell School of Nursing.
 - Five students completed the B.A./M.A. in the Graduate School of the Morrissey College.
 - One student completed the B.A./M.A. in the Lynch School—Graduate Programs.
 - Thirty-four students completed the B.A./M.Ed. in the Lynch School—Graduate Programs. Two students completed the B.S./M.ED. and one student completed the B.A./M.A. fifth-year program.
- The Academic Services team fulfilled 95 requests for replacement diplomas, generating income of \$4,750.
- The Academic Services team fulfilled 13 apostille requests.

RECORDS

A total of 23,456 transcript requests were submitted with 36,642 transcripts issued this year (see chart below). Transcript requests were completed daily, generally exceeding the stated fulfillment time of three to five business days.

Transcript Requests

Year	Transcript Requests from Individuals	Total Transcripts Processed
2012–2013	31,333	54,622
2013–2014	28,973	49,606
2014–2015	26,085	42,635
2015–2016	23,932	39,616
2016–2017	23,456	36,642

The Academic Records and Certification Specialist completed 976 forms, which included, but was not limited to, verification of degree, GPA, and enrollment, dean's certifications, and letters of good standing.

EAGLEAPPS SIS

The Director, Associate Director, Academics, and the Business Analyst participated in meetings four days per week with the academic functional team as development continued on the replacement for the university's student system (UIS).

In preparation for the conversion to the new EagleApps system, the group focused on the documentation of the policies and practices for course offering, program enrollment, academic record, registration, advising, degree audit, transfer articulation, grading, and graduation.

The group worked also with the Curriculum Management (CM) team to ensure that CM content would be integrated with the course offering module.

CLASSROOM SCHEDULING

One-Time Room Reservations

The process of releasing classroom space earlier to the Events Management Office which began in December, 2015 continued in December 2016, when classroom space was released one month prior to the start of the spring term instead of the eighth day of the term. Classroom space was released in March for the 2017 summer term and in early July for the fall 2017 term.

Classrooms that are undergoing reconstruction or reconfiguration over the past year include the following:

- Changes to Simboli Hall 100 which included reducing the number of seats to 60 and furnishing with moveable tables and chairs. The capacity of Simboli 130 will be 40. The remaining tablet armchairs from Simboli Hall 100 will replace the old furniture in Gasson 208 and Lyons 409.
- O'Neill Hall 246 is back online with a capacity of 30 students. The use of this room must be approved by the Center for Teaching Excellence.
- Carroll School of Management senior administrators are continuing to make every effort to maximize class scheduling of management courses in Fulton Hall.
- Construction continues in Devlin Hall and will continue through the fall 2017 semester. Classroom 216 will be converted to space for the undergraduate admission office and a comparable new classroom will be added. The new classroom is Devlin 018 with the same capacity of 40.
- Lyons 208 is being converted to a collaborative classroom for use by the Slavic and Eastern Languages department.
- Seating was replaced in two classrooms in Fulton Hall.
- Fan coil units were replaced in Gasson Hall, which limited classroom availability for summer 2017.
- In the future, underutilized classrooms that should be redesigned for greater utilization including Devlin 026, Fulton 240, Higgins 280, and O'Neill 254.

Classroom Utilization

Classroom utilization is shown in the following charts. Classrooms changes and upgrades in O’Neill should continue to receive priority to increase the utilization.

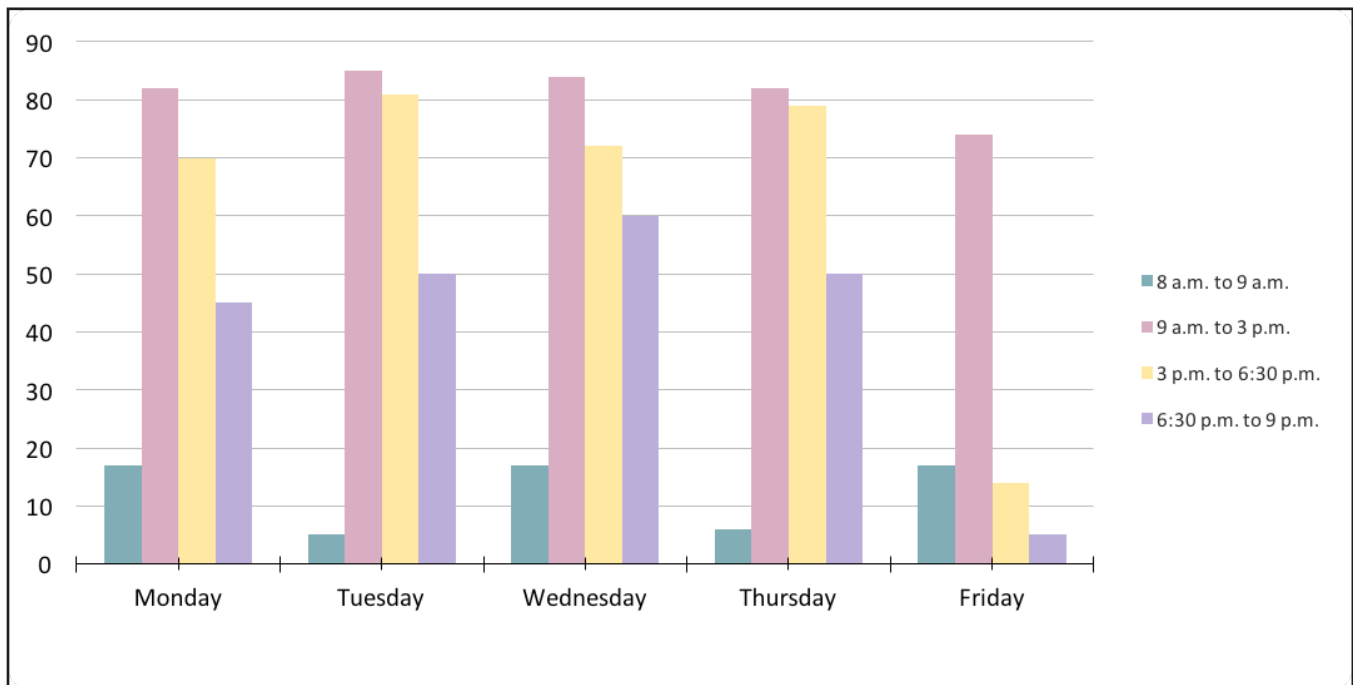
Average Classroom Utilization by Building

Year	Merkert	Lyons	Gasson	Fulton	Campion	Stokes	Cushing	Devlin	McGuinn	Higgins	O’Neill
Fall 2014	84%	92%	87%	84%	85%	78%	76%	75%	75%	66%	38%
Fall 2015	78%	77%	90%	85%	85%	83%	53%	83%	74%	78%	54%
Fall 2016	87%	86%	83%	85%	88%	83%	75%	80%	68%	73%	53%

Average Classroom Utilization by Classroom Size

Classroom Size Range	1–24	25–99	100+	
Fall 2014		62%	81%	91%
Fall 2015		62%	81%	87%
Fall 2016		59%	83%	89%

Classroom Utilization by Day and Time—Fall 2016



GOALS

- In preparation for the conversion to the new EagleApps system, continue documenting the business requirements for course offering, program enrollment, academic record, registration, advising, degree audit, transfer articulation, grading and graduation. Conduct user acceptance testing (UAT) as needed.
- Employ metrics to track activity, productivity, and progress.
- Maintain security of sensitive data, analyze vulnerabilities, and recommend mitigating strategies.
- Prepare training and documentation materials for new systems.
- Continue to review information regarding policies, procedures, and related changes with the service and academic teams on a regular basis.
- Review/revise policy and procedural manuals.
- Develop an expert academic team that is cross trained with a strong commitment to serving students and faculty.
- Review and correct all academic records that are incorrect or missing from the Folderwave database. Insure that there are no paper academic records on-site.
- Prepare for change from percentages to specific GPA cutoffs for undergraduate Latin honors.
- Prepare for the change in undergraduate day students registering for BC summer courses without dean's approval.

General Services

General Services continued to assist students, parents, faculty, staff, and visitors through three major channels: voice, in-person, and e-mail while supporting the offices of Graduate and Undergraduate Financial Aid, Student Accounts and Academic Services. General Services also worked closely with the Eagle-One Card, and Transportation and Parking offices and used the CSGOLD and AIMS systems to view, add, and update Eagle-One Card Plans and issue Parking Permits as well as to process corresponding financials. The office supported other campus constituencies with annual events including commencement, orientation and Welcome Week.

From June 1, 2016, to May 31, 2017, total voice, in-person, and e-mail contacts equaled 135,045. Past years' totals were: 143,041 for the year 2015–2016 and 142,322 for the year 2014–2015. The 5% change against last year's total contacts, reflected the shift of the registration of undergraduate day school students from Student Services back to the Woods College of Advancing Studies for the spring 2016 semester; the completion of the re-issuance of student security ID cards, in August of 2016; and the Boston Theological Institute's new online registration system that allowed students to register without coming to Student Services.

OPERATIONAL HIGHLIGHTS

- 18% increase in e-mails answered over the last year. E-mails answered in 2016–2017 totaled 26,180. E-mails answered 2015–2016 totaled 22,152.
- 16% decrease in the number of transfer calls to Financial Aid. General Services recorded 1,990 Financial Aid transfer calls in 2016–2017 as compared to 2,358 in 2015–2016. This First Contact Resolution (FCR) results had a positive impact on the customer experience.
- “Average Talk Time” (ATT), which is the average duration of answered calls, was maintained below 2.50 minutes. “Average Speed to Answer” (ASA), which is time to connect to a Customer Service Representative (including time in queue and ring time), was maintained below .40 seconds.
- 400 outreach calls to accepted students with incomplete Financial Aid files made by the team.
- 8,200 proxy Eagle ID cards issued to select populations (both student and administrative) in support of the university-wide Security Project.
- 946 undergraduate day school registration forms processed for Summer School for a total of 1,755 registrations.
- 520 “Call Recordings” reviewed for Payment Card Industry (PCI) compliance by the manager.
- 425 records created for non-BC users, including contractors, and visiting scholars and faculty.
- Collaborated with the Office of Organizational Effectiveness to host the annual retreat under the theme “Resilience.”
- Service Team involved in testing the “My Third-Party Proxy Access” application that allows students to share course history and grading information with parents, faculty, and other third parties.

CHALLENGES

In August 2016 one Student Services position was upgraded to a Business Analyst position and reassigned to the Student Information Services Team. In March 2017, a Student Services Associate resigned and the position

remains vacant. Three members of the Processing team and one Staff Assistant have provided support to the Service Team by responding to e-mails and providing counter support. Training will begin for responding to inbound calls.

At the beginning of the fall 2016 semester, the new security identification card generated many issues for students. General Services' response was professional and conciliatory. All parties depended on our frontline staff to accurately communicate the varied problems so that they could be resolved.

Auxiliary transactions, which included parking and Eagle-One Card services, continued to be complex and time-consuming operations. In addition the University's QuikPay Payment Plan, for which General Services provided enrollment, budget creation, and rebalancing support was challenging. Training and consistent supervision were required to meet the demands of completing these tasks, especially those classified as exceptions.

JUNE 1, 2016–MAY 31, 2017 REVIEW

General Services was able to reduce the number of transfer calls to the Financial Aid office by 16% again positively impacting First Contact Resolution (FCR) with minimal effect on Average Talk Time (ATT), which increased by .24 seconds to 167 seconds in 2016–2017, from 143 seconds in 2015–2016. The efficiency with which the team was able to resolve customer issues as measured by Average Speed to Answer calls (ASA) and Average Talk Time (ATT) changed slightly. ASA increased in 2016–2017 to 39 seconds, a two second increase over 2015–2016 which was 37 seconds. In 2016–2017, 83% or 45,117 calls were answered in one minute representing a 1% decrease over 2015–2016 when 84% or 50,871 calls were answered in 60 seconds or less.

General Services was again able to realize the Service Level Agreement (SLA) for response to e-mails set during the 2015–2016 fiscal year. The SLA required that incoming e-mails be responded to within 24 hours, instead of the previous 48 hours. During 2016–2017, e-mail responses were answered within 24 hours, 95% of the time.

Despite the challenges mentioned above General Services continued to deliver quality service to our customers. The solid operational achievements were mostly due to strategic hiring, training, supervision, access to resources, and associates maintaining a strong overall knowledge base.

SERVICE CONTACTS

Total service contacts equaled 135,045 in 2016–2017 a decrease by 5% over the 143,041 recorded the previous year. A general explanation for the decrease was provided under the heading General Services above.

A breakdown of total service contacts follows:

- Academic: 25,901 (5% increase)
- Auxiliary: 26,249 (17% decrease)
- Billing: 26,212 (4% decrease)
- Financial Aid: 41,497 (8% decrease)
- Miscellaneous: 10,481 (6% decrease)

Voice contacts totaled 59,138 in 2016–2017 compared to 62,923 in 2015–2016. Voice contacts for this past year included: calls—54,433, Interactive Voice Response (IVR)—2,671, customer call-backs—65, and 1,969 inbound and outbound calls from the queue line. Calls continued to be the major channel through which customers reached the Office of Student Services. Parents, applicants—both graduate and undergraduate—and the parents of applicants were the primary callers. The 6% decrease in calls was offset by an 18% increase in e-mails, which, for students, is the preferred method of communication.

The categories below show the number and percentage of calls answered for 2016–2017:

- Academic: 9,053 or 17%
- Auxiliary: 2,794 or 5%
- Billing: 14,001 or 26%
- Financial Aid: 22,389 or 41%
- Miscellaneous: 6,196 or 11%

In-person contacts totaled 49,727 in 2016–2017 as compared to 57,966 in 2015–2016, a 14% decrease. This was not a surprise for the following reasons: Between January and May 2016, the university re-issued Eagle-One ID cards to over 6,000 students which accounted for the increase in in-person contacts in 2015–2016 and the subsequent decrease in 2016–2017. Additionally, Cross Registration was automated beginning September 2016 and course registration for Woods College of Advancing Studies courses, by undergraduate students, shifted from General Services to Woods College in January 2017.

The categories below show the number and percentage of in-person transactions for 2016–2017.

- Academic: 12,659 or (25%)
- Auxiliary: 21,960 or (44%)
- Billing: 5,254 or (11%)
- Financial Aid: 8,374 or (17%)
- Miscellaneous: 1,480 or (3%)

The staff printed 11,700 Eagle-One Cards, distributed 10,164 parking permits, including consultant and non-Boston College User permits, most of which were exceptions. Processing exception permits required referral to a manager, database research, or consultation with the Office of Transportation and Parking.

Many complex exceptions were processed in-person or in batches for special groups, including St. John's Seminary faculty, staff, and student Eagle-One cards and parking permits, Jesuit community parking permits, visiting scholar Eagle-One cards, and Nursing's continuing education Eagle-One cards and parking permits.

E-mail contacts increased by 18% this year. The office responded to 26,180 e-mails during 2016–2017 and 22,152 during 2015–2016.

The categories listed below show the number and percentage of e-mails answered in 2016–2017.

- Academic: 4,189 or (16%)
- Auxiliary: 1,495 or (6%)
- Billing: 6,957 or (27%)
- Financial Aid: 10,734 or (41%)
- Miscellaneous: 2,805 or (10%)

Service Contacts: June 1, 2014 to May 31, 2017

Year	Type of Contact	Academic	Billing	Financial Aid	Misc.	Auxiliary	Totals	Calls Answered in 1 MM	% of Calls Answered in 1 MM
2014–2015	Calls	8,995	14,077	33,275	6,753	3,180	66,280	57,506	87%
	IVR						2,577		
	Callbacks						50		
	In-Person Contacts	12,011	5,166	9,001	3,827	22,661	52,666		
	E-mail Contacts	3,028	4,761	9,615	2,204	1,141	20,749		
	Total Contacts	24,034	24,004	51,891	12,784	26,982	142,322		
2015–2016	Calls	9,141	16,328	26,071	5,869	2,905	60,314	50,871	84%
	IVR						2,551		
	Callbacks						58		
	In-Person Contacts	12,281	5,201	9,450	3,292	27,742	57,966		
	E-mail Contacts	3,173	5,848	9,872	2,070	1,189	22,152		
	Total Contacts	24,595	27,377	45,393	11,231	31,836	143,041		
2016–2017	Calls	9,053	14,001	22,389	6,196	2,794	54,433	45,117	83%
	IVR						2,671		
	In&Out Calls/Callbacks						2,034		
	In-Person Contacts	12,659	5,254	8,374	1,480	21,960	49,727		
	E-mail Contacts	4,189	6,957	10,734	2,805	1,495	26,180		
	Total Contacts	25,901	26,212	41,497	10,481	26,249	135,045		

PROXY AND OTHER PORTAL SERVICES

Staff continued to perform proxy services on behalf of customers, including password resets and transactions for MyBill, Eagle-One Cards, and parking permits. Staff also assisted customers with the range of Portal transactions, including course history and grade mailers, course information and schedule, credentials and secondary passwords, degree audits, enrollment certifications, payment plans, student refunds, emergency contact updates, address changes, Eagle-One Card activity and replacement parking permits, financial aid applications and awards, medical insurance waivers, and transcript requests. Finally, staff assisted or redirected customers with questions about the learning management system, commencement, residential life, information technology services, and student employment.

TRAINING AND PROFESSIONAL DEVELOPMENT

The office added two new full-time staff members this fiscal year. New staff training was extensive, and veteran staff continued professional development. The purpose of this training was not only to review existing policies and procedures, but to reinforce verification processes and the importance of confidentiality, security, and authentication while performing tasks. This year, four staff members from General Services attended the Massachusetts Conference for Women. Two participated in the Boston College Colleagues in Mission Program. One attended the Customer Service Experience Conference and three attended TMetrics Training.

GOALS

- Continue training to improve customer satisfaction, First Contact Resolution, percentage of calls answered in one minute, Average Talk Time, and Average Speed to Answer.
- Explore with TMetrics and Network Services the possibility of incorporating e-mail as part of the TMetrics system. The feature is currently being offered by TMetrics and could facilitate integrated reporting. The feature could also allow associates to work across two major channels: voice and e-mail.
- Explore the possibility of integrating Chat through TMetrics. With the 18% increase in e-mails answered this year, there is a benefit to giving students another way of interacting electronically.
- Explore the possibility of incorporating the TMetrics PCI Solution. It would benefit Associates, callers, and the university to maintain Payment Card Industry standards electronically. This year we processed 520 compliance reports manually, moving to an electronic process could positively impact privacy and security.
- Provide training for staff on the Student Accounts (EASA) as necessary. Train the Service Associates on the Student Accounts (EASA) system that will be introduced in June 2018.
- Revise and reintroduce professional standards and ethics for the Service team.
- Ensure that staff have an understanding of the University's mission and vision and how they can be applied to their work environment.
- Provide training and test the replacement screen for Student Accounts (EASA) to ensure its functionality and ease of use.
- Train the Service Associates on the new light provisioning application, which was introduced in June 2017 and allows students to grant proxy access to parents, guardians, and others to view their academic records.

Student Accounts, Receivables, and Operations

Listed below are the 2016–2017 activities and accomplishments for the Student Accounts, Student Receivables, and Operations areas.

Student Accounts is primarily responsible for the billing and maintenance of students' accounts at the university. Staff ensure that accounts are accurate and that all university policies are enforced.

Student Receivables handles the management and accounting of all cash, Federal Perkins, Nursing, and Institutional loans as well as all student account and student loan receivables collection, and they maintain university and department standards.

Operations support services in all areas of Student Services including academic, financial aid, student accounts, and auxiliary services processing, as follows: transcripts, diploma printing, account adjustments, financial aid documents, loan certifications, refunds, ID/prox production, meal plan adjustments, graduation, parking permits, and freshman orientation.

STUDENT ACCOUNTS/RECEIVABLES

The student account receivables ended the year at \$907,398. This represented the tenth consecutive year that the audited receivable was below 1 million even as tuition and fees have increased approximately 50% over the same time period.

Year	Receivables	% of Change	Dollar Change
2002	\$1,676,355		
2003	\$1,535,101	-8.43%	-\$141,254
2004	\$1,537,266	0.14%	\$2,165
2005	\$1,229,948	-19.99%	-\$307,318
2006	\$1,172,877	-4.64%	-\$57,071
2007	\$1,152,913	-1.70%	-\$19,964
2008	\$871,241	-24.43%	-\$281,672
2009	\$922,477	5.88%	\$51,236
2010	\$915,645	-0.74%	-\$6,832
2011	\$770,440	-15.86%	-\$145,205
2012	\$807,575	4.82%	\$37,135
2013	\$673,787	-16.57%	-\$133,788
2014	\$739,662	0.09%	\$65,876
2015	\$774,632	0.05%	\$34,970
2016	\$816,195	0.05%	\$41,563
2017	\$904,873	0.10%	\$88,678

Monthly Payment Plans

The move from Tuition Management Systems (TMS) to QuikPAY Payment Plans (QPPP) continued to be a success. Student Accounts has seen a 65% increase over our final year with TMS (2011–2012) in total dollars processed. Both the number of plans and the total dollars processed marked all-time highs for our monthly payment plan process.

QuikPAY Payment Plans are fully integrated with the existing My Bill service, thus eliminating the need for students and parents to maintain separate login credentials and receive separate billing statements. In addition to the enhanced convenience offered by an integrated payment plan solution, QPPP accounts have the ability to reconcile, manually or electronically, with student account balances. The increase in the number of plans also correlated with an overall reduction in the student loan volume over the past several years. During freshman orientation and in personal counseling sessions with students and families, staff encouraged them to use the payment plan before a loan for outstanding balances.

Monthly Payment Plans Summary

Year	Accounts	Payments
2007–2008	1,640	\$50,077,632
2008–2009	1,714	\$55,972,055
2009–2010	1,706	\$57,268,651
2010–2011	1,610	\$54,626,357
2011–2012	1,425	\$52,220,146
2012–2013*	1,745	\$60,531,649
2013–2014	1,978	\$70,589,430
2014–2015	2,197	\$78,403,483
2015–2016	2,245	\$81,203,839
2016–2017	2,275	\$86,350,523

*First year with QuikPAY Payment Plans was 2012–2013.

Federal Direct Loan Program (DL)

Student Services continued its participation in the DL program. After reconciling over 70 million dollars in DL funds, staff closed out the FY16 fund year with the federal government. Total Direct Loan funding ended the year at \$72,940,262.

Direct Loan Disbursements

Year	Subsidized Direct Loans Spent	Unsubsidized Direct Loans Spent	Graduate Direct Loans Spent	Parent Direct Loans Spent	Total Direct Loans Spent
2012–2013	\$19,378,900	\$37,349,205	\$12,951,935	\$17,650,898	\$87,330,938
2013–2014	\$14,779,725	\$36,057,969	\$11,770,865	\$16,769,343	\$79,377,902
2014–2015	\$12,024,619	\$33,007,057	\$11,082,724	\$16,591,411	\$72,705,811
2015–2016	\$10,778,796	\$33,463,837	\$12,175,229	\$15,510,290	\$71,928,152
2016–2017	\$12,162,564	\$30,736,213	\$13,798,149	\$16,243,336	\$72,940,262

Department of Veterans Affairs Post 9-11 GI Bill and Yellow Ribbon Program

Boston College's ninth year of participation in the Post 9-11 GI Bill and Yellow Ribbon Program was a success. One hundred five (105) eligible veterans or dependents received GI Bill funding of \$1,723,278, with 74 of those students receiving Yellow Ribbon awards totaling \$222,750. These awards were matched by the Veterans Administration for a total Yellow Ribbon benefit to student-veterans of \$445,500. For 2017–2018, the university will increase Boston College's level of participation to 85 students, each receiving up to \$6,000 per year, an increase to help defray the rising costs of tuition and fees.

NCAA Special Assistance

Our frequent communication with the Athletics department ensured that the automated disbursement for NCAA Special Assistance medical insurance and foreign tax payments ran smoothly, which helped maintain accurate student account balances. This past year, Athletics offered SAF funding for certain summer athletes' tuition and room and board fees not covered by athletic scholarships. This more than doubled the amount of refunds and account adjustments processed over the previous year.

Cashnet

The volume of payments in Cashnet increased in 2016–2017. Once again College Savings Plan payments grew, indicating that more families are planning for their educational expenses. Operations continued to assist the Undergraduate and Graduate Admission offices with resolving Cashnet problems, and staff processed all paper check payments for the Woods College of Advancing Studies.

Student Account Funding Sources

Year	% External Agencies	% Employee Aid	% Scholarship & Grants	% AHANA & OTE	% Athletic Aid	% Loans (includes MEFA & PLUS)	% E-payments & Checks
2014–2015	6.38%	1.61%	15.12%	0.98%	2.94%	15.28%	57.69%
2015–2016	6.85%	1.54%	15.35%	0.97%	2.87%	14.66%	57.76%
2016–2017	7.36%	1.61%	14.85%	0.98%	2.96%	13.95%	58.29%

Flywire

Flywire continued to grow in popularity with Boston College's international population. Six hundred ninety (690) students from 57 countries made payments totaling \$9,426,554, up nearly 25% from 2016. The average payment was \$13,662. Cooperation among the staff in Student Services and from the Office of International Programs (OIP), the School of Theology and Ministry (STM), the Carroll School of Management—Graduate Programs (CSOMGP), and the Boston College Law School, as well as the Office of International Students and Scholars (OISS) ensured smooth payment processing. Flywire pursues and adds new currencies as well as partners with additional countries/universities to broaden their scope and ease the burden of international payments for students.

Payment Volume by Country

Year	Country/Territory of Origin	Total Amount
2016–2017	China	\$3,157,019
	Korea, Republic of	\$1,626,571
	Australia	\$127,860
	India	\$364,238
	United Kingdom	\$234,539
	Taiwan	\$413,259
	All Others	\$3,503,068
	Total	\$9,426,554
2015–2016	China	\$2,532,306
	Hong Kong	\$304,068
	Korea, Republic of	\$1,646,532
	Panama	\$322,257
	Philippines	\$180,988
	Russian Federation	\$155,081
	All others	\$2,426,593
	Total	\$7,567,825

2014–2015	Australia	\$59,023
	China	\$2,553,177
	Hong Kong	\$322,054
	India	\$107,960
	Korea, Republic of	\$1,568,425
	Panama	\$300,969
	All others	\$1,924,255
	Total	\$6,835,863

Perkins Loans

The government's extension of the Perkins program included lending restrictions that caused major challenges for the financial aid staff. The parameters significantly limited the number of students who were able to receive the Perkins loan this year. Thus our lending was lower than over the last five years.

Nine-hundred two (902) Perkins loan cancellations were processed in 2017 for a total of \$819,783. Cancellations provided financial relief from Perkins loan debt for graduates of the Connell School of Nursing, the Boston College Law School, the Lynch School of Education, and the Boston College School of Social Work.

Perkins Loan Program Default Rates

For 2016–2017, we were able to maintain a low Perkins cohort default rate of 1.51%. This was exceptional given the size of the portfolio at 6,846 borrowers and a receivable of \$25 million.

Boston College Student Loan Funds Default Rates as of May 31, 2017

	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
Perkins Program (Cohort)	0.93%	1.52%	0.97%	2.22%	2.32%	1.77%	0.33%	2.91%	1.24%	1.54%	1.51%

Loan Volume

- Total campus-based loans disbursed: \$2,441,624
- Perkins loans disbursed: \$1,293,441
- 344 students received Perkins this year
- 303 student promissory notes (electronically)
- 6 Perkins promissory notes (manually)
- 902 loan cancellations were processed this year in the amount of \$819,783.

Loan Exit Interviews

- 1,727 borrowers exited online this year.
- 2,757 exit documents were signed on the web.
- 1,393 class of 2017 students were counseled in person (exits).

Over the past 12 years, the campus-based loan staff has provided both electronic exit interviews and in-person exit counseling via group sessions, which was the most beneficial for our graduates since counseling covered repayment and forgiveness options for all federal loans including Direct Stafford and Graduate Plus loans.

The success of exit interviews is clearly measured by the university's consistently low Stafford and Perkins loan default rates.

OPERATIONS

FileMaker Pro

Operations continued to design, maintain, and support a number of databases on the FileMaker Pro server. At present, there are more than 40 active databases that are used by all areas of Student Services and several other offices across campus. In response to the Provost's office request for better outreach, staff modified one of these databases to begin sending financial aid missing item e-mails to accepted students. They also modified the system for returning students to include the specific missing items in the e-mail. As a result, Financial Aid saw an increase in completed financial aid applications. This past spring we added the vacation time tracker for the Office of Undergraduate Admission to assist with their management needs.

Commencement

The Bursar and Director, Operations served as Chief Marshall of the Field during commencement and oversaw the setup of the handicapped seating app and the rain ticket distribution system. The system was utilized by the Office of the University Secretary and University Bookstore for distribution of tickets and parking passes.

ID Services

Over the past year and half, Operations has participated in the Campus Security Project spearheaded by Campus Police. This involved the conversion of the current ID from mag stripe technology to a prox card. Several changes had to be made to existing systems and procedures, and both the printers and the cameras were replaced. The existing databases were modified to accept the prox information and transmit it to the new C-Cure Access system. Operations had to plan and execute a re-carding procedure to distribute the new cards. The distribution was planned and executed with minimal impact on the daily functions of the office, and all students were effectively carded prior to their return to campus last September. Since January 2016, Student Services has produced over 22,000 prox cards for students and staff. Due to the cost for the new cards, the university raised the replacement fee to \$30 and the cost of a new student ID to \$45 effective as of the fiscal 2018 year.

EagleApps Student Accounts (EASA) Implementation

Due to a slower than anticipated development schedule, the implementation of the new Student Accounts System was once again delayed until June 1, 2018. Development work and testing continue as we move toward the new target date. The goal is to have the system completed by late November 2017, although it will not be implemented until the fiscal close due to the complexity of converting mid-year.

Student Support Services

The goal of Student Services is to provide high quality, professional customer service in the Ignatian tradition. Student Support Services seeks to serve all working groups within the Office of Student Services by assisting them in reaching their goals in support of our collective mission.

The Student Support Services Team successfully collaborated with each working group in the division to increase our level of internal and external service. Selected highlights for the reporting period follow:

- **Diplomas Printed:** We assumed diploma printing operations for all schools. A total of 4,081 diplomas were printed and approximately 250 reprints were completed.
- **Admissions Outbound Calling Project:** We worked with Undergraduate Financial Aid to place personal phone calls and follow-up with individual e-mail to approximately 847 Pell eligible admitted students. Our mission was to increase admissions yield with the population.
- **Student Debt Management Outreach Project:** In an effort to minimize the amount of Alternative Loan borrowing, the team placed outreach calls to students with approved Alternative Loans in an effort to encourage them to utilize all Federal Loan eligibility. Approximately 326 student contacts were attempted. One-hundred seventy-nine (179) students were successfully counseled resulting in approximately \$358,000 less in Alternative Loan borrowing across this population.

Student Employment Support

The Student Services Support Team, took on the full support of Student Employment for the reporting period with one team member committed almost full-time. A total of 2,183 I-9 forms were completed in the hiring of on and off-campus student employees. Additionally, several university-wide communications were sent to on- and off-campus employers with guidance on the following:

- **Massachusetts Minimum Wage Increase:** Communication was sent about the most recent wage increase effective this past January 1 and how that affected rates for hourly-paid student employees. Our last notice on the wage increase was sent in November 2016.
- **Affordable Care Act (ACA):** Communication was sent concerning the aggregate limit of how many hours students can work each week and the number of weeks they are allowed to work for each period. The first notice was sent in 2015, which is when Student Employment started to require students to submit Payroll Form Statements in addition to their I-9 Forms.
- **The Human Resources Service Center (HRSC):** At the request of the HRSC, communication was sent to campus employers about the record updating process and preparation for the upcoming wage increase.

- **Summer and Academic Year:** Student employment period information was sent in April which contained dates of employment for each period and how employers can post their jobs on the Student Employment web listing and submit their student hires through PeopleSoft. It also included a reminder about the aggregate limit of number of hours students can work each week.
- **Academic Year:** Student employment information was sent a week before fall semester classes began, which included the aggregate limit of the number of hours students can work during the academic year.
- **Massachusetts Sick Time Law:** Communication was sent to inform all on and off-campus employers about the new law, and guidance was provided on the record-keeping and use of this new benefit to student employees.

Alternative Loan Certification

Support Services continued to utilize ELMnet to certify most Alternative Loans. A new web-based platform was introduced. Staff self-trained, and there were no adverse consequences as a result of this transition.

First Year Experience (FYE)

Student Support Services continued to play an important role in the First Year Experience process. In the 2016–2017 reporting period, we registered 2,459 incoming students in Sessions I–VII. Each student was mailed a welcome packet by the printer or by Support Services, and an Eagle One Card was created for them. Students’ parents or guardians were also provided with parent IDs to access services while on campus. Student Support Services was responsible for monitoring the number of registrants, and e-mail and telephone outreach campaigns were conducted to ensure Eagle One Card creation and session attendance. The team also supported Academic Services during the weekly registration and advisement days. Student and full-time employees were deployed to ensure that all computer technology for registration was in place and that the I-9 student employment process was supported.

MBTA Passes

2008–2009	562 MBTA Passes	\$126,508
2009–2010	667 MBTA Passes	\$144,144
2010–2011	570 MBTA Passes	\$122,101
2011–2012	810 MBTA Passes	\$175,554
2012–2013	991 MBTA Passes	\$254,273
2013–2014	743 MBTA Passes	\$186,038
2014–2015	711 MBTA Passes	\$193,981
2015–2016	794 MBTA Passes	\$215,141
2016–2017	671 MBTA Passes	\$194,040

Parking Permit Issuance

- Processed 3,935 employee parking applications
- Processed 2,701 student parking applications
- Processed 971 temporary parking applications
- Processed 1,610 proximity card applications

Additional Support Provided

As has been the practice and tradition in prior years, selected staff from the Student Services Support Team move forward at the beginning for each semester to assist the General Service department with front counter, parking, and ID creation operations. Three of our team members have also volunteered to take twice weekly shifts in General Service to help cover staff vacancy.

GOALS

- Continue planning and testing the implementation of Sigma's student accounts system.
- Maintain a student receivables of \$1 million or less.
- Prepare and train the staff to respond to university needs.
- Participate in the replacement of the UBUY financial aid system.
- Monitor Department of Education changes that will impact the Perkins Loan program.
- Continue to maintain a very good cohort and standard default rates on the Perkins Loan program.
- Prepare and implement a Financial Responsibility Statement for students to sign.
- Secure and implement a new 1098-T processor for the 2017 tax year to replace the service our vendor is no longer providing.
- Continue to meet department goals and standards while doing so in a compassionate way that reflects the university's Ignatian tradition.

Undergraduate and Graduate Financial Aid and Student Employment

UNDERGRADUATE AND GRADUATE FINANCIAL AID

Funding

Financial Aid continued to enjoy a steady increase in Boston College need-based funding. In addition to meeting the full institutional need of all undergraduates, Financial Aid was able to reduce loan borrowing for undergraduates with significant debt by replacing some current loans with Boston College funding, which resulted in a reduction in students' overall borrowing.

Undergraduate Need-Based Aid Awarded

2010–2011	\$78,473,243
2011–2012	\$86,530,083
2012–2013	\$95,114,95
2013–2014	\$96,482,992
2014–2015	\$101,064,183
2015–2016	\$107,029,868
2016–2017	\$111,303,015

Incoming Freshman Outreach

Financial Aid experienced a slight increase in the number of families seen over the three Admitted Eagle Days. This may be attributed, in part, to staff being able to send several missing item e-mails to accepted early action and regular decision students and transfers. A total of 20,856 e-mails were sent. Additionally, we were able to add some text about the financial aid application process to a December outreach effort conducted by the Undergraduate Admission Office.

Admitted Eagle Day Visits

2014–2015	323
2015–2016	203
2016–2017	221
2017–2018	235

Financial Aid, with the help of the Service and Processing staffs, did outreach to Pell-eligible accepted students in April. Calls were made to approximately 847 students. As a result of these efforts, Financial Aid saw a significant increase in the number of deposited students with Pell eligibility. As the chart indicates, deposits from Pell eligible freshmen increased by 61 compared to last year.

Deposited Freshmen with Pell Eligibility (Based on May Data)

Year	Number	Percentage of Class
2015–2016	203	9.4%
2016–2017	290	12.3%
2017–2018	351	13.7%

Caseload Volume

Financial Aid was able to begin the Incoming cycle for all groups on time this year, and staff were about one month early with the Returning cycles. We also saw the effects of the early FAFSA filing date (October 1, 2016) which were reflected in the increased numbers. The only groups that declined slightly were Incoming Graduate and Incoming Law with enrollment for those groups dropping as well. The numbers for 2017–2018 reflect processing through July 12, 2017. Caseload numbers will increase by the end of the cycle.

Caseload Numbers

Aid Year	Incoming Undergraduate	Returning Undergraduate	Incoming Graduate	Returning Graduate	Incoming Law	Returning Law	Total
2015–2016	3,688	3,468	785	759	889	379	9,968
2016–2017	3,747	2,466	592	447	827	328	8,407
2017–2018	4,024	2,628	591	524	756	344	8,560

Graduate and Law

This past year, the graduate team worked closely with the Woods College staff on the online master's degree in Health Administration. Although small in numbers, BC's first online program generated many questions—including cost of attendance and eligibility and disbursement—that were handled by staff in addition to the review and awarding process.

Administration functions for the awarding of federal financial aid for law students was moved to the Financial Aid Office on the main campus last September. Though some functions are still handled at the Law School, at least initially, the majority of processing now takes place in the main office, including answering questions. We were happy to welcome a new part-time staff member to assist with these duties.

Audits

Financial Aid participated in the following audits:

- 2016 A-133: No findings.
- 2017 A-133: In process. Audit being performed by PricewaterhouseCoopers.
- On September 28, 2016, we received notification from the U.S. Department of Education that our response to the Program Review resolved all findings and the review was now considered closed with no further action required.

Federal and State Regulatory Issues

Prior-Prior

October 1, 2016 marked the first day students could complete the FAFSA for the 2017–2018 cycle. This was also the first year that families would be reporting income from two years prior (prior-prior). Though a major change, the implementation went relatively smoothly. Planning sessions had taken place between Financial Aid, Boston College's Information Technology Systems (ITS) staff, and Sigma to prepare for the system roll-out. Additionally, Enrollment Management, with help from Financial Aid, worked on budget forecasts to try to anticipate the impact using the same income data for two consecutive years would have on the budget. Much of that impact is still being analyzed, but we did see an increase in awarding during the freshman cycle. We definitely saw a significant increase in the number of applications completed either early or on time throughout both the incoming cycles and the returning cycles.

IRS Data Retrieval Tool (DRT)

In early spring, the Department of Education announced that the IRS Data Retrieval Tool, an integral part of easing the FAFSA application process, had been taken down due to security concerns. It will be unavailable for the remainder of the 2017–2018 cycle though the Department of Education has promised it will be available for the 2018–2019 cycle. This tool allowed families to transfer their income data directly from the IRS to the FAFSA, thus providing a faster application experience. It also guaranteed accurate income data which significantly reduced the number of verification cases selected for follow-up. Because of this, the Department of Education reversed several of their regulations concerning verification which has provided some relief to the aid office. Those changes resulted in several system updates to rules in order to make sure the correct information concerning document requirements was presented to the student. Since we expect the DRT to be available next year, those changes will have to be backed out once the cycle starts.

Wind-down of Perkins

The Federal Perkins Loan Program Extension Act of 2015, enacted on December 18, 2015, extended the Perkins Loan program through September 30, 2017. It replaced the previous law which effectively ended the Perkins program as of September 30, 2015, with some grandfathering provisions. The office expects that the Perkins program will not receive any additional extensions, and we are awaiting further guidance as to how to end the program.

ProSAM Installations, Enhancements, Fixes

The 2016–2017 academic year marked the third year in ProSAM. Staff continued to see improvement in system functioning and grew in knowledge of the system. Issues still occur, and Financial Aid continues to work closely with ITS and the Sigma staff to resolve them. Work continues on two new modules.

New Module Installations/Processes

Mass State Grant Module

Testing of the certification and disbursement pieces of this new module were completed. Due to a delay in funding from the state, disbursement in a production environment was not possible for the spring 2017 semester awards. Testing is in progress for the reconciliation process. Assuming that goes well, this module will be ready to move to production for the 2017–2018 cycle, a full year later than had been planned two years ago.

Work-Study Module

This module went live in August 2016 but with limitations. Many issues were encountered, including late payments, earnings being applied to the wrong term, incorrect data, etc. The Associate Director for Student Employment has worked tirelessly with ITS staff as well as staff from the Financial Vice President's area to identify issues and test fixes. This continued throughout the entire year. Reporting from the work-study module continued to be an issue, and the Associate Director spent a great deal of time identifying the problems and testing the delivered fixes, often repeatedly. It appears that ITS is now completing the fixes needed to give us error-free reports.

Institutional Awards Module

Due to the student account system implementation delay from June 2017 to June 2018, the go live date for this project has been delayed until April 2018. Additionally, numerous issues had been identified in the portal interface. Significant testing has been done on the financial aid “pre-packager” functionality. We had initially hoped to have an automated process for the graduate awards, but due to some Sigma limitations on their batch packaging process, we were forced to revise our specifications. Work was done in the testing environments to accommodate those changes, and so far, testing results are positive, though much work remains.

Reporting

We continue to operate without reliable reporting. After extensive testing, some data fields, mostly around awards, were made available in the EDW to a very limited audience. However, issues with the data were identified and that access was pulled back. The EDW staff continues to work on those issues as well as data mapping problems. Transactional reporting is almost non-existent. There are only three reports available to financial aid staff. Since last year's annual report, six more rounds of data validation have occurred. We continue to wait on further updates from ITS regarding their progress. Monthly meetings/calls are being held to review outstanding issue and potential solutions for both EDW and transactional reporting.

Our goal continues to be able to generate our own reports rather than relying on the Enrollment Management Office.

Enhancements

Graduate Automation

One of the attractive features of ProSAM was its automation and batch capabilities. Financial Aid was able to automate much of the process for incoming law students for the 2016–2017 cycle. For 2017–2018, after much work done by our Student System Business Analyst, the budgeting and awarding functions for the incoming and returning graduate populations are now done via a batch process, and the worklist follow-up has been automated—reducing the manual work for the aid staff as well as providing the graduate students with more timely award notifications.

Pell Reconciliation

Reconciling the Pell Grant program has been a manual function since ProSAM went live. In fall 2015, we began work with Sigma staff to use their automated feature. Work continues, and we are now targeting a go-live date of September 2017.

Fixes and Ongoing Issues

Since ProSAM went live in 2014–2015, we have experienced an issue with how summer terms are treated by other processes within ProSAM. During the 2015–2016 year, Sigma did add a feature that allowed us to “lock” a specific term. Unfortunately, that proved to be a difficult feature to implement successfully. It wasn’t until 2016–2017 that we were able, after much testing, to get it to work. A weekly report is now run to monitor the process.

Our graduate budgeting process depends on the number of credits students report they will take. That information is reported on the BC Financial Aid Application. From the beginning, we requested from Sigma a mechanism that would be able to send that data through the message queue from Folderwave to ProSam. As part of the graduate automation project, Sigma was finally able to give us those system changes, and we were able to go live with the new process, saving the graduate counselors from manually entering this data on every application. Unfortunately, we discovered later that the fix caused other problems and had to be backed out of production. Sigma did come up with a work-around, and we have an outstanding ticket in with them to resolve the issue. The same batch job that controls these processes also controls a document process, and we are experiencing an issue with that as well. A separate ticket has been submitted.

For the 2017–2018 cycle, Sigma converted to a new module to track and store ISIRs, similar to how they process Profile data. This change proved challenging for both BC and Sigma, and several conference calls were held during the late fall and winter months. It is stable now, and we have gained some significant benefits from it.

A related process is our subsequent ISIR process. This has been a difficult one from the beginning so this year, we requested and received some enhancements. Once again, getting those from test to production proved very challenging, and there were many delays along the way. It is now in production and appears to be working as intended. However, we are looking to further enhance it for next year as we had to revise some of what we wanted in order to get it into production.

Cycle start-up for 2017–2018 was challenging due to the early release of the FAFSA and the use of prior-prior data. Unfortunately, this affected Profile processing as well. Our initial go live date for the FAFSA data was late October/early November and Profile data in early December. Instead we began loading both Profiles and FAFSA's in late December. We also had some issues after the production loads began and had to stop loading at least twice. We were, though, able to go live with all related jobs and processing earlier than last year. We were able to begin reading the Early Action students on time.

Due to the termination of the Need Access application for graduate students, the Lynch Graduate School of Education made the decision to start using the Profile form for their students who apply for their very limited pool of need-based funds. Unfortunately, they did not share this decision with the aid office. It was difficult to accommodate this new file from College Board, but after a meeting with some of the GSOE admission staff and several meetings with ITS, a process was worked out. We are now able to download both files successfully.

Due to the use of prior-prior income data on the FAFSA, we worked with Folderwave to institute a process that copied 2015 tax data forward from 2016–2017. This meant that families did not have to resubmit that information and allowed for a timely completion rate. There have been a few glitches in that process but, generally, it worked well and saved BC families extra paperwork.

Integration between UIS and ProSAM remains one of our biggest challenges. A recurring issue concerns students with special characters in their names. This stops integration. There is currently no system resolution, so the only way to fix it is to have the Admission Office remove the special character, thereby changing the student's name.

As staff become more comfortable with this system and start to utilize other functionality, the Director of Financial Aid anticipates that the current close working relationship with ITS and Sigma will continue as work proceeds on an ongoing list of fixes and enhancements. Staff continued to have a weekly conference call with Sigma and ITS as well as a weekly meeting with ITS to resolve issues that arise as well as prepare for what tasks lie ahead.

Goals: Undergraduate Financial Aid

- Continue to work with ITS and Sigma Systems to implement, fix, and enhance ProSAM.
- Work with ITS and Sigma Systems to finish testing and implement the remaining modules.
- Continue to work with the ITS staff to develop Cognos reporting functionality.
- Continue to prepare and deliver training and documentation materials for the new financial aid system.
- Implement all federal regulatory changes within mandated dates.
- Expand federal compliance oversight.
- Continue to monitor all federal aid processes and spending.
- Continue to monitor and enhance institutional processes.
- Continue to monitor spending in all need-based institutional programs.
- Update the Higher Education Opportunity Act (HEOA) Notices and Disclosures.
- Continue to evaluate Boston College's partnership with American Student Assistance's SALT program.
- Continue to expand and support the Successful Start Program.

- Compile requests for new Folderwave functionality.
- Continue to achieve successful A-133 audits and internal audits.
- Enhance the quality control process.
- Continue to improve the Financial Aid website.
- Continue to meet or exceed award notification deadlines.
- Develop more consistent customer service skills when communicating with families.
- Continue to improve training plans for all areas of Student Services.
- Work with Enrollment Management on issues of access, particularly among low income students.
- Continue to review yield analysis and consider additional changes to the packaging policy to reduce costs or to provide funds to achieve greater diversity.
- Support Montserrat Task Force's efforts to ensure all students have books at the start of each term, are aware of student employment opportunities, and are advised about financial expectations.
- Use NCAA web-based software and electronic exchange of data to support financial aid athletic eligibility.
- Maintain the stability of the Financial Aid team.

Goals: Graduate and Law Financial Aid

- Continue to reach out to the graduate schools to help them with financial aid processes and presentations, as well as with continuing efforts to align financial aid awarding more closely with admission notifications.
- Work with the Director of Admission and Financial Aid at the Lynch School of Education, Graduate Programs to expand their use of the Profile data now available to them.
- Review and update web-based forms, information, and materials for 2016–2017.
- Review graduate student housing, transportation, and other living expense components, so that our standard graduate Cost of Attendance budget for 2016–2017 will reflect reasonable costs. Revise related data in ProSAM rules to reflect 2016–2017 direct and indirect costs, such as tuition rates, fees, and any revisions to living expense allowances.
- Assist with testing of the new Institutional Awards module as it relates to graduate students.

STUDENT EMPLOYMENT

As reported last year, there were no new federal regulations concerning the Federal Work-Study (FWS) Program or the Affordable Care Act this past year, and no change in the current Federal Minimum Wage of \$7.25 per hour, which has been in effect since July 24, 2009. However, the benefits resulting from passage of the Massachusetts Earned Sick Time Law were available to students who worked for the university during the summer of 2016; and the third and final annual increase in the Massachusetts Minimum Wage became effective January 1, 2017.

The Massachusetts Earned Sick Time Law, with ruling from the Attorney General's Office, resulted in the decision that our student employees are able to earn, accrue, and use sick time during the summer and carry over accrued sick time to the next summer employment period. We provided information about this law and posted the Public Notice to employers and BC student employees via links on the main page of our Student Employment website. We also included a link to Q&A's to answer any questions employers and employees may have. Our office also sent information to campus employers, off-campus agencies that employ our Federal Work-Study awarded students, and to students employed during the summer of 2016. Of the BC students who worked through our

Off-campus FWS Program last summer, only one student used hours that she had accrued. It is our objective to notify campus employers and off-campus agencies, as well as our students working for the University during the summer of 2017, reminding them about this law and its entitlement to our hourly-paid student employees.

The Massachusetts minimum wage increased \$1.00 per hour for the third consecutive year on January 1, 2017, from \$10.00 to \$11.00 per hour. As in past years, discussions were held on campus during the fall semester as to what changes should be made to the Student Wage Structure, the budgetary impact for the University resulting from the minimum wage increase, and how best to execute these changes in PeopleSoft HR. Personnel from our office, the Budget Office, HRIT and HR/Compensation participated in these discussions. As in previous years, our office communicated information to campus employers in December, answered questions, responded to concerns and monitored any hires created in PeopleSoft HR and routed to our office for review of the pay rate to ensure compliance with the University guidelines.

Accomplishments

On August 12, 2016, our Student Support Specialist sent an e-mail reminder to campus employers about the upcoming academic year employment period so that a varied listing of employment opportunities would be available for students to review when postings would be available on the web beginning Wednesday, August 24, 2016.

In order to provide equal employment opportunity for all interested BC students, academic year opportunities are first made available on a specific date. On August 24, 2016, there were 41 listings posted from 27 different campus employers, compared to:

- 33 listings from 19 departments on August 26, 2015
- 36 listings from 24 departments on August 27, 2014
- 57 listings from 44 departments on August 28, 2013
- 53 listings from 37 departments on August 29, 2012
- 32 listings from 28 departments on August 31, 2011

Listings do not include any specific number of openings available, so each can have from one to dozens depending on the employer posting that position.

Provided assistance with testing different components of the Work-Study (student employment) module in our ProSAM financial aid system prior to and post rollout when this module was moved to production at the start of the 2016–2017 academic year; and worked with the Controller's Office in verifying data in PeopleSoft Financials. In addition, assisted with reviewing the output of production reports created in this system, and brought discrepancies to the attention of ITS.

On April 7, 2017, the Student Support Specialist e-mailed to campus employers-PeopleSoft users our annual information letter about the upcoming summer and academic year. Information included:

- A reminder about the maximum number of hours-per-week students can work during certain times of the year

- A note from the University's finance division about the need to minimize the cost to departments and to the University due to the annual Massachusetts minimum wage increase
- Notice that merit hire differentials remain suspended for all grades in the Student Wage Structure, and extended through the end of fiscal year 2018.

During academic year 2016–2017, BC students earned more than \$7,144,800 through our Federal Work-Study and general on-campus (Non Work Study) employment programs. This total came from a report produced by ITS which is working on creating new production reports.

In comparison, BC students earned more than:

\$6,529,600 during AY 2015–2016
\$6,202,500 during AY 2014–2015
\$6,411,400 during AY 2013–2014
\$6,031,600 during AY 2012–2013
\$5,958,200 during AY 2011–2012
\$5,774,400 during AY 2010–2011

Also, at the end of academic year 2016–2017, there were 1,866 BC student hires (1,735 undergraduates and 131 graduate and law students) in the PeopleSoft HR system being paid through the weekly student payroll process, and the average pay rate was \$11.67 per hour, based on a recently-produced report by ITS.

Prepared and submitted in September, and again in early December of 2016, the Federal Work-Study section for our annual FISAP reporting to the U.S. Department of Education. Included in this report:

- Students earned \$2,969,937 gross during FY2016 compared to:

\$2,950,360 during FY2015
\$3,078,528 during FY2014
\$3,155,983 during FY2013
\$3,355,571 during FY2012
\$3,199,533 during FY2011

In addition, 193 students worked in Community Service-designated employment during 2016 compared to 204 the previous year; and, of those 193 students, 48 were employed as reading tutors of children through the BC Neighborhood Center, compared to 55 students the previous year.

On March 29, 2017, we submitted a mid-year FWS analysis that included a projection that 2016–2017 academic year expenditures would total \$2,800,000; however, at this time and based on the recent report from ITS, \$2,704,900 was earned by FWS-awarded students.

We continued assisting employers in selecting appropriate student job titles and pay rates when looking to hire students performing new duties. In addition, our Student Support Specialist has been the primary reviewer of student (re)hires being routed to our office via PeopleSoft HR when campus employers are looking to pay a wage

beyond the university-approved student wage guidelines. Any appeals continue to be directed to Associate Director for review and final determination. She also continued to be the primary contact for agencies participating in our Off-Campus FWS Program, as well as creating the job requests in PeopleSoft HR submitted by agencies, processing off-campus hires in PeopleSoft HR and processing/approving off-campus weekly time sheets in Kronos.

Goals: Student Employment

- Monitor weekly FWS expenditures throughout the year and submit a mid-year analysis including recommendations for next summer and academic year.
- Prepare the FWS part of the FY2017 FISAP and submit that completed section in late September.
- Continue working with ITS to resolve issues that arose during this first year of the ProSam Work-Study module. Ensure that relevant student employment and earnings match data in UIS and in the financial aid system. Work with the Controller's Office to verify data in PeopleSoft Financials. Test the functionality and reliability of data for Federal Work-Study reporting in the yearly FISAP for FY2017.
- Update web-based system and printed information and materials for the 2017–2018 summer and academic year employment programs.
- Monitor via media reporting the efforts and interests of student employees at colleges and universities to unionize, following rulings by the National Labor Relations Board.

Communication

During the 2016–2017 academic year, the Communication staff successfully completed their annual projects, which included: providing print, e-mail, and web support for all areas of Student Services; working closely with the University Secretary’s office for all commencement-related communications; collaborating with the Academic Advising Center and the Core Renewal staff to revise the *Academic Planning Workbook* and making all updates to freshman print materials; publishing the 2017–2018 university catalogs; producing the Student Services’ monthly eNewsletter; continuing to enhance Student Services’ social media presence; and updating the academic services, faculty, registration, commencement, and publications and scheduling calendars. In addition, the team devoted many hours preparing for the conversion to an enhanced curriculum management system (CM) as well as supporting Student Services’ and Information Technology’s (IT) new course offerings and degree audit initiatives.

The updates for the Communication area are listed as follows.

STAFFING

With the new Communication Specialist on board since March 2016, Communication is now fully staffed. In September 2016, one of Student Services’ new Business Systems Analysts was assigned to work with the Communication team as our liaison to the IT and CM consultants. He has been helpful with testing the new CM system and resolving technical issues.

The Communication team committed a significant amount of time—averaging between 10 and 15 hours per week from July 2016 through June 2017—to new system development, extensive User Acceptance Testing (UAT), User Interface (UI) testing, and data validation for the new CM. The team also devoted time to learning how to use uAchieve, the University’s new degree auditing system, and meeting with the program and course enrollment teams to discuss the integration of CM with course offerings, programs, and degree audit.

ANNUAL PROJECTS UPDATE

Academic Services

Academic Calendar

The Communication team updated the academic calendars to reflect the decision by the academic deans to discontinue the extended pass/fail period in order to ensure the alignment of the drop/add and the pass/fail periods. Beginning in 2018, the new calendars will include the fall break—Columbus Day and the Tuesday that follows—and the Wednesday substitution for Monday during the second week of classes in spring 2019 and 2020, which is required for balancing the number of class meetings for those semesters. The Assistant Director also drafted academic calendars for 2020, 2021, and 2022 according to University guidelines, and the Communication team participated in discussions with the Enrollment team about generating future academic calendars.

Academic Calendar Magnet

We continued to work with our vendor Caliber Logo to produce the academic calendar magnet. The order for 2,500 magnets and the final cost were same as last year's. Print production and delivery went smoothly.

University Calendar

For the past two years, the Communication and Academic Services teams have worked together to generate a combined publications, Core, and academic services calendar for the department administrators. However, the combined calendar proved unwieldy. At the request of the Associate Director of Academic Services, the teams have gone back to separate, more directed calendars with several additional scheduling dates included in publications and scheduling. The Communication Specialist and the Senior Communication Specialist also work with General Services to update Important Dates for the Student Service's monthly eNewsletter and website, thus ensuring that calendars are now created and maintained to serve the needs of the entire university community, including faculty, students, parents, and administrators.

Undergraduate Catalog

The Senior Communication Specialist coordinated with ITS to get the catalog extract for courses scheduled for the 2017–2018 academic year and also flagged for print in CM. This year, a more accurate extract resulted in an increase of 35 pages from 301 in 2015–2016 to 336 in 2016–2017. In addition to a better extract, the increase in page count can be attributed to more cross listed courses and longer course and program descriptions. The Executive Director had previously approved a reduction in the number of copies from 5,000 to 4,500. Fortunately, the increased page count affected the cost of print production and mailing only slightly. The cost for print increased from \$18,900 to \$19,350, and the cost for mailing actually decreased from \$1,075 to \$1,019.82.

Graduate Catalog

The Communication Specialist continues to work closely with the graduate schools to ensure that their information is accurate and ready for posting to the Student Services website prior to the start of classes in August. The Communication team is planning to have the new catalog PDF completed in early August, sooner than in previous years and well in advance of the October deadline for the annual Higher Education Opportunity Act (HEOA) notification.

Commencement Program and Commencement Guides

The Senior Communication Specialist was required to manage the ever-increasing complexity of commencement-related publications during the 2017 commencement cycle, which began in November and continued through the Friday before Monday's commencement ceremonies and included: managing the flow of information from the commencement coordinators, creating a security flyer, parking and transportation maps, and securing the most accurate versions of the Commencement Program's front and back matter. This year, he also worked closely with the Senior Graphic Designer in University Communications to align the Commencement Program with the university graphic standards.

Commencement E-mails

Based on the Senior Communication Specialist's recommendation from 2016, the commencement coordinators took a more active role in responding to their students and parents, and there were fewer questions directed to Student Services. This year, the Senior Communication Specialist, in response to inquiries from Institutional Research about increasing the response rate for their Post-Graduation Plan survey, recommended that graduating students would benefit from a centralized and directed list of required services which could be posted on BCServices.

Academic Planning Workbook

Per the request of the Assistant Director, Academic Advising, the Senior Communication Specialist ordered 250 copies of the *Academic Planning Workbook* only (separate from the *Welcome Book*) for advisors to use during orientation. With the approval of the Executive Director, Student Services reduced the number of kits and the total order of the Freshman Welcome Packets from 3,500 to 2,750. The Manager, Procurement Services informed the Senior Communication Specialist that the *Welcome Book*, the *Academic Planning Workbook*, and the *Undergraduate Catalog* will all need to go out to bid for next year's publishing cycle.

Financial Aid

The Senior Communication Specialist met with student members of the Undergraduate Government of Boston College (UGBC) to discuss a new communication strategy for the "Meet Your Financial Aid Counselor" event held annually in October. After much thought, it was decided that the counselors greeting students ought to be located outside of Lyons Hall, on the outskirts of the Quad, to attract the attention of passersby. The Senior Communication Specialist created a new sandwich board, which was placed outside of Lyons to increase traffic to the event. Last year's flyer was updated and posted on BCInfo, the TV screens in O'Neill, on social media, and on the Student Services' website. The Senior Communication Specialist and the Senior Assistant Director, Financial Aid asked UGBC to help spread word of the event. Unfortunately, the number of student attendees decreased from 44 in 2015 to 28 in 2016. Communication will need to review additional tools and methods for improving outreach.

General Services

In August 2016, the Communication team worked with the Special Assistant to the Vice President, Student Affairs and Director of Special Projects to publicize Boston College's association with TurboVote, a system which simplifies the process of registering to vote by including electronic reminders, polling information, and absentee ballots, in the Student Services' eNewsletter. Student Services will maintain the Voter Registration Information web page and provide a link to TurboVote from this web page and in the eNewsletter.

New Business Policies and Procedures

- As of spring 2017, new alpha program codes have been finalized for all university majors, concentrations, minors, specializations, programs of studies, and certificate programs and will be included in "Programs" in the new CM, enrollment, and degree auditing systems.
- In March 2017, the eSyllabus system was replaced by Canvas Search, which is managed by Instructional Design and eTeaching Services (IDeS) and housed in Canvas. Communication helped publicize the move

with an e-mail announcement to faculty in March and notices to students in Student Services' March and April Newsletters in time for summer and fall advising and registration. We updated the Student Services website with a notice about the change and links to instructions for searching and uploading syllabi in Canvas. Syllabus Search provides instructors more flexibility with designing and sharing their syllabi and provides students easier access, advanced searching, and real time updates of syllabi. Syllabi posted before summer 2017 are still available in Course Information and Schedule.

eSyllabus Totals by Term

2016F	1,037
2016S	1,079
2016U	45
2017F	1,154
2017S	1,108
2017U	32

SYSTEM UPDATES

Degree Audit Reports: RQ0120 and RQ0100

The Assistant Director generated the Degree Audit (RQ0120) and the Degree Audit Systems Requirements (RQ0100) reports for all audited majors, minors, or concentrations to help staff encode the degree and program requirements into the new uAchieve degree auditing system. While these reports together provided the source documents for the encoding, there are still a number of interdisciplinary minors and concentrations that were never audited in the old system and will need to be codified and added to uAchieve. Until the new EagleApps system is in place, Communication will need to update both the RQ file in UIS and uAchieve.

Curriculum Management (CM)

After two years of development and testing, the new curriculum management system went live on June 30, 2017. Although all of the transactions remained the same—departments can create, modify, and retire courses—there were many changes to the screen design, search features, and workflow. On the course create and modify screens, the internal report replaced the transcript title; the student and requirement levels and final exam types have been added by request from the Enrollment Services team; the grading scale, repeatable for credit, and course requisite screens have been revised; and a new field for course fee has been included.

Testing sessions ran from July 2016 through June 2017, usually twice a month, five days a week, for a minimum of two hours per session, often with additional time needed to meet deadlines. The Communication team, our Business Analyst, and work study students all participated. Five department administrators also participated in User Acceptance Testing (UAT) in November and March.

The testing sessions are listed as follows:

- Three testing sessions for validating the integration of new CM with UIS and course information and schedule.
- Repeated smoke tests and retest of failures as needed.
- UAT and UI testing: Averaged 53 scripts with 20 steps per script with screenshots. Tests performed on all University supported browsers.
- CM screen testing in all University supported browsers.
- Data Validation: Two reviews of 330 courses with screenshots for old CM, new CM, and UIS with separate screenshots for course requisites.

There are still a number of bug fixes and enhancements that need to be monitored and resolved, including troublesome issues with browsers, saved drafts, course requisites, course versioning, and validations for cross listed courses, intended for the integration of enrollment with CM in 2019, but currently in place and affecting course updates for the fall 2017 and spring 2018 semesters.

Communications conducted four training sessions in April 2017, and we will schedule sessions in the fall. The team developed and distributed a Quick Reference Guide in time for go live. We will work with ITS training to develop a video tutorial and FAQs.

Services Catalog

The Senior Communication Specialist continues to work with the Services Catalog team to add additional Student Services transactions to the Services Catalog, which will include a range of links to Student Services transactions, policy, practice, and checklists.

GOALS

- Complete implementation of all changes to CM. Monitor enhancements and resolve system bugs.
- Prepare training materials for the new CM.
- Implement the uAchieve degree audit.
- Contribute to the development of the Services Catalog by including additional links to Student Services' transactions and checklists.
- Continue to support Core Renewal pilot courses with publicity and degree audit integration.
- Redesign the Student Services' electronic newsletter.
- Support the introduction of online courses and degree programs, new certificate programs, and modular courses.
- Develop more efficient ways to process information for all print and web documents.
- Develop a digital, searchable catalog.
- Provide ability for the departments to produce reports from data in CM.

Student Information Services

PRODUCTION, REPORTING, RESEARCH, AND DATA ANALYSIS

Reporting Activity

The Student System Information Specialists, with the assistance of undergraduate and graduate student employees, produced reports requested by a number of on- and off-campus constituencies. Cognos usage has increased steadily, as a result of the phasing out of Oracle Discoverer in Spring 2017, and with the addition of additional business areas to the Enterprise Data Warehouse (EDW). The volume of requests continued to increase as shown on the activity summary included in the Reporting chart.

Yearly Breakdown

	2010–2011	2011–2012	2012–2013	2013–2014	2014–2015	2015–2016	2016–2017
Oracle	3,591	3,571	3,530	5,566	6,736	6,806	6,561
UIS	863	1,063	2,333	2,002	1,816	2,136	2,318
Cognos						64	314

Other Initiatives

In addition to reporting, Information Services was involved extensively in two ongoing initiatives:

Enterprise Data Warehouse and Cognos Reporting Tool

- Course Offerings, Course Enrollments, and Student Accounting were moved to the EDW this year.
- Several members of Information Services and subject matter experts in Student Services assisted Information Technology Services (ITS) in understanding the reporting structure and needs that will inform decisions regarding data structure.
- Financial aid data, including hundreds of new fields related to financial aid management in ProSAM, has been added and is now being validated and tested. However, due to errors and problems with the data in the EDW, access to the data is highly restricted, and testing and data validation is ongoing.
- The need for current real-time financial aid data for troubleshooting and caseload management, as well as other reporting, resulted in the development of a separate transactional database. This database incorporates selected student and student account data in addition to financial aid. Due to the complexity of the data in ProSAM, as well as the lack of database documentation from the vendor, development has been slow and is not yet complete.
- The ability to obtain accurate, timely reports for financial aid continues to be a problem four years after implementation of ProSAM for financial aid, resulting in a continued reliance on SQL queries run by Student Services staff directly in ProSAM or reports generated by the Enrollment Management team.

Business Glossary

Information Services continued to help build the Business Glossary with the goal of providing a central resource for technical users of the Operational Data Store (ODS). The glossary, containing descriptive information about each data element in ODS, including the business definition, data owner, data format, valid values, name of source system, and other descriptive information, continued to grow with new categories and terms planned for the future.

Goals: Production, Reporting, Research, and Data Analysis

- Continue to support and participate in efforts to enhance the new Enterprise Data Warehouse.
- Work with users, particularly within Student Services, to create custom reports in Cognos as needed.
- Support and help prepare for the conversion to the new EagleApps Student System.
- Continue to assist with the building of the Business Glossary.
- Provide assistance with the conversion to Cognos 11 and work with the EDW team to suggest improvements to student, course, enrollment, and financial aid data in the warehouse.
- Assist with the development of a transactional database for Financial Aid.

ONLINE COURSE EVALUATIONS

Additional Customized Survey Questions

The addition of course or program specific questions to the standard questionnaire expanded again this year with Core Assessment adding new questions. The Systems Support Analyst managed the addition of all survey questions and expanded the scope of reporting at the request of the Associate Dean of the Core.

Law School Survey Period

The Law School continued to expand their course evaluation period and align it with the rest of the university. Fall course evaluations took place from November 28 through December 22, 2017. The response rate was 89.4 percent, slightly higher than the 86.5 percent response rate achieved last fall. Spring evaluation dates were held from April 12 through May 18, 2017 ending one day after the non-Law survey closed. The response rate for spring was 90.2 percent slightly higher than the 86.2 percent rate achieved last spring. Grades were again withheld for Law students who did not complete all of their online course evaluations; however, in order to ensure that the graduation clearance process was not affected, grades for third-year Law students were only withheld until May 18. Grades for first- and second-year Law students were withheld until June 12.

Integration with New Student Information System

Planning meetings were held in September and again in June to plan for the integration of course evaluations with the new student system. In September the Systems Support Analyst met with the Director, Academic Systems, Service Delivery & Web, Applications Services, ITS, and designated team members to plan for the change to importing data from the data warehouse to ODS and to investigate the changes necessary to continue the grade withholding process in EagleApps.

Reporting

The instructor view of course evaluation reports was enhanced by an upgrade to the course evaluation product, Blue, which provided a streamlined dashboard. Research into trend-reporting with the vendor determined that they do not have options yet for instructor historical trend analysis. The Office of Institutional Research requested this data for faculty reporting, and the Systems Support Analyst will need to provide the raw data to Institutional Research after each survey.

Survey Description	Survey Start Date	Survey End Date	Response Rate	Total Number of Respondents	Total Number of Surveys
Fall 2016–2017 Mid-Term Survey	10/16/2016	10/29/2016	67.7%	431	637
Fall 2016–2017 End-of-Term Survey (Law)	11/28/2016	12/22/2016	89.4%	2,578	2,885
Fall 2016–2017 End-of-Term Survey (Cornerstone)	12/5/2016	12/22/2016	66.8%	187	280
Fall 2016–2017 End-of-Term Survey (non-Law)	12/5/2016	12/22/2016	87.4%	53,533	61,272
Spring 2016–2017 Mid-Term Survey	3/2/2017	3/17/2017	76.4%	295	386
Spring 2016–2017 End-of-Term Survey (Law)	4/12/2017	5/18/2017	90.2%	2,820	3,127
Spring 2016–2017 End-of-Term Survey (non-Law)	5/1/2017	5/17/2017	87.1%	48,159	55,317
Total				108,003	123,904

	12–13 Fall	12–13 Spring	13–14 Fall	13–14 Spring	14–15 Fall	14–15 Spring	15–16 Fall	15–16 Spring	16–17 Fall	16–17 Spring
Law	78.8%	79.7%	89.0%	78.6%	77.4%	86.2%	86.5%	86.1%	89.4%	90.2%
Non-Law	80.4%	82.8%	86.0%	85.1%	84.2%	84.8%	83.8%	87.8%	87.4%	87.1%
Mid-Term	62.7%	58.9%	62.6%	63.2%	71.3%	64.0%	60.1%	54.1%	67.7%	76.4%
Cornerstone	88.3%		86.4%		86.7%		86.3%		66.8%	

Goals: Online Course Evaluations

- Upgrade to Blue 7.0 and explore possible implementation of new features such as:
 - Report building for instructors
 - Cascading surveys
 - Redesigned report viewer management
 - SMS for student engagement
 - Possible integration with Canvas

- Integration with EagleApps
 - Importing data from ODS
 - Course evaluation flag in Course Offerings
 - Grade withholding
- Offer new response rate monitor to administrators
- Create the Academic Advisor survey for Spring 2018 and include the new pre-major/major advising comparison reporting

INFORMATION TECHNOLOGY SUPPORT AND MANAGEMENT

Support for UIS and Existing Software Applications

The Information Services team continued application support for all Student Services' related systems including daily production scheduling, annual setup, issue tracking and resolution, and change management. The specific systems supported included:

- Financial aid system maintenance and the implementation of the new Institutional Awards and work-study and state scholarship modules
- Existing and new student systems related to registration, transcripts, course grading, etc.
- Enterprise Data Warehouse
- Graduate Admission
- Undergraduate and Graduate Financial Aid
- Student Employment
- Curriculum Management and Master Course
- EagleApps Enrollment implementation

There were several notable projects during the past year:

Financial Aid Institutional Awards Module (UBUY replacement)

- The Aid Commitment definitions were created and Campus unit designations entered into ProSAM for testing using 2016–2017 UBUY funds. Security access and assignment of appropriate Campus Unit(s) were completed in Locksmith for testing.
- Training and demonstrations of new functionality conducted for FVP area.
- Extensive testing of ProSAM Institutional Award module and user interface conducted by Student Services, ITS staff, and consultant.
- Multiple issues identified during testing, tickets submitted to BC ITS or Sigma as needed, and items retested.
- Extensive testing conducted in conjunction with FVP area, including budget changes, disbursement testing, and third approver testing.
- Go live delayed until 2018–2019 (June 2018) due to delay in Student Account's go live. A number of issues were identified and additional testing required in IA module/UI before system is ready.
- Goals:
 - Set up and test ProSAM IA and UI using 2017–2018 funds.
 - Conduct complete round of end-to-end testing internally.

- Conduct complete round of end-to-end testing with FVP area.
- Train departmental users.
- Implement IA for FY19.

Clearinghouse Transmissions for Certification of Enrollment and Degree Verify

- Worked with the Clearinghouse to fine-tune scheduling of the Degree Verify and Enrollment reporting transmissions to reduce the number of errors.
- Continued to monitor enrollment reporting statistics on the NSLDS website to insure compliance with minimum standards set by the Department of Education. Our percent certified with Program Enrollment, a key gauge of our level of compliance, has risen steadily over the past year to its highest level of 98.83% achieved in May 2017.
- Conducted ongoing monitoring of both the Clearinghouse and NSLDS websites to insure that data is processed correctly and any potential reporting problems are identified as quickly as possible.
- Documented annual processing cycle and manual work-arounds required due to the limitations of the current UIS enrollment reporting batch job.
- Testing and 3rd approver testing.
- Worked with Academic Services team to develop an internal process of error report review and resolution to insure timely and accurate reporting of enrollment data.

Curriculum Management

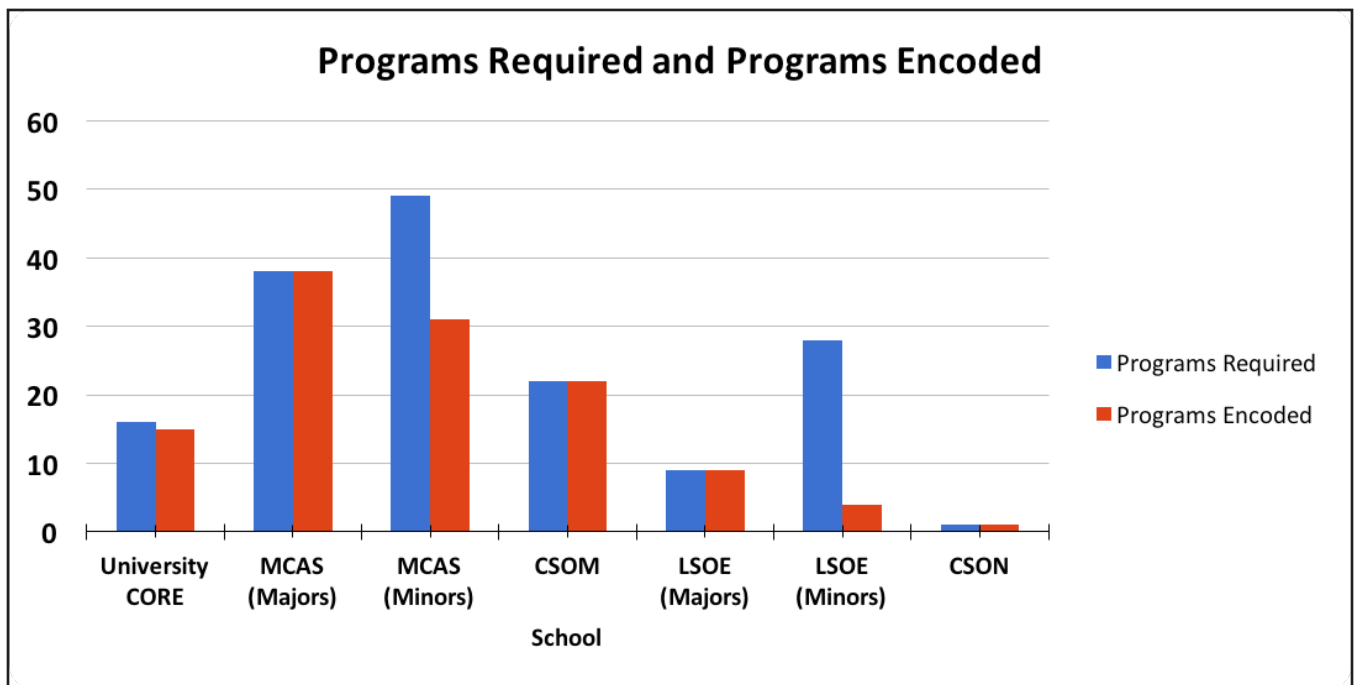
- Courses successfully released to production, scheduled to go live on June 30.
- Five rounds of testing successfully completed.
- Administrators from several departments (STM, MCAS, BCSSW) tested and accepted the new CM.
- 581 courses successfully validated as part of QA and production data migrations.
- New database successfully demonstrated for department administrators.
- New programs screens designed and developed.
- Documented policies and procedures for new CM database
- Goals:
 - Test and launch programs screens.

Degree Audit

- In less than 6 months, 74% of all undergraduate programs have been encoded.
- Introductory training for users completed.
- Advanced training for select users completed.
- Transfer Articulation debuted for Student Services, Admission, and International Programs.
- Three BC representatives attended CollegeSource Conference in San Diego for training and collaboration.
- Goals:
 - Encode all remaining programs
 - Expand degree audit to graduate schools (LAW to start)
 - Complete Transfer Articulation training

Degree Audit Encoding

School	Programs Required	Programs Encoded	Percentage Encoded
University CORE	16	15	93.8%
MCAS (Majors)	38	38	100%
MCAS (Minors)	49	31	63.3%
CSOM	22	22	100%
LSOE (Majors)	9	9	100%
LSOE (Minors)	28	4	14.3%
CSON	1	1	100%



EagleApps Enrollment

- Requirements gathering for the Enrollment Module was completed with the following processes written and approved in the last year:
 - Separation
 - Registration
 - Grading
 - Academic Record
 - Attach Day/Time/Location (Scheduling)
 - Program Enrollment
 - Transcripts
 - Commencement

- Requirements for Holds, Messaging, and Reporting are continuously updated to match new functionality within the system.
- All Quali Code was migrated onto new EagleApps QA and Dev Servers.
- Developed test plans for Course Offering.
- Goals
 - Develop test plans for all Enrollment modules.
 - Test Sigma and BC development work with the Enrollment team functional users.
 - Continue to develop and begin the initial testing of the new Enrollment functionality.

FolderWave/Woods College of Advancing Studies

The Woods College of Advancing Studies online admissions implementation project continued in 2016–2017. Admissions testing continued through July and weekly project meetings for integration with Financial Aid began in July. The admissions portion of the implementation was completed while Financial Aid integration is still ongoing.

UIS Batch Job Modifications

- Transcript batch job ST0022 was modified to remove the Certification Officer title and name on Lynch School of Education's transcripts to make the transcript more generic.
- Modified ST0890 transfer to the student file to prevent transfer of a record when one already exists for same program on UIS (affected withdrawals and deferrals).
- Modified ST39 to remove the edit that prevented Woods College of Advancing Studies—Graduate Programs and Carroll School of Management—Graduate Programs from flagging courses as pass/fail.
- Modified MH02/MH10 to remove the edit requiring a major or majors when creating a certificate.
- Modified registration transactions to prevent Athletes and International students from falling below full-time, allowing only Student Services to override.

New Business/Systems Development

- Assisted with data analysis/research as part of an exploratory review of CRM systems.

Goals: Information Technology Support and Management

- Create functionality to allow online deposits for graduate admissions (LSOEGP, CSONGP, CSOMGP, BCSSW, and STM).
- Continue to assist with requirements definition and user-testing of the new Enrollment module.
- Continue to assist with the implementation of new financial aid modules related to Institutional Awards as well as the ongoing improvements to the financial aid module.
- Continue to provide functional and technical support for UIS and existing software applications.
- Continue to troubleshoot and research system issues and work with ITS and users to resolve them.
- Assist with the process of new vendor selection, testing, and implementation for 1098-T processing.

SCANNING SERVICES

Exam Scanning

- Clients this year included new instructors in the Lynch School of Education and the Connell School of Nursing. After a five year absence, the Management and Organization department began utilizing Scanning Services again in the spring of 2017.
- Scanning Services processed the largest number of exam sheets since tracking began in the fall of 2016 with 24,439 sheets scanned in the fall semester.
- Remark software was upgraded to the latest version. New features added more flexibility and convenience to the analysis procedure. New reports were generated starting in spring 2017 and were well received.
- An elegant, comprehensive and easy-to-use Excel report was added to the test result output. “Individual Student Report” for exam scanning became a key report for some instructors.
- SPSS analysis program no longer works with Windows 10. As a result the old Word and Excel reports generated by SPSS have been gradually replaced by Remark reports in spring 2017. The old reports will be discontinued completely starting in summer 2017.
- A graduate student assistant, initially hired last year, is now more experienced and provided valuable assistance to Scanning Services. In addition, a member of our Processing staff was trained to assist with scanning whenever necessary.

Summary of All Scanning Jobs

	Exams	Paper Form Course Evals	Surveys (Jensen and All Others)	Grand Total
Summer 2016	1,137	367	5,701	7,205
Fall 2016	24,439	73	1,289	25,801
Spring 2017	17,182	266	1,497	18,945
Year Total	42,758	706	8,487	51,951

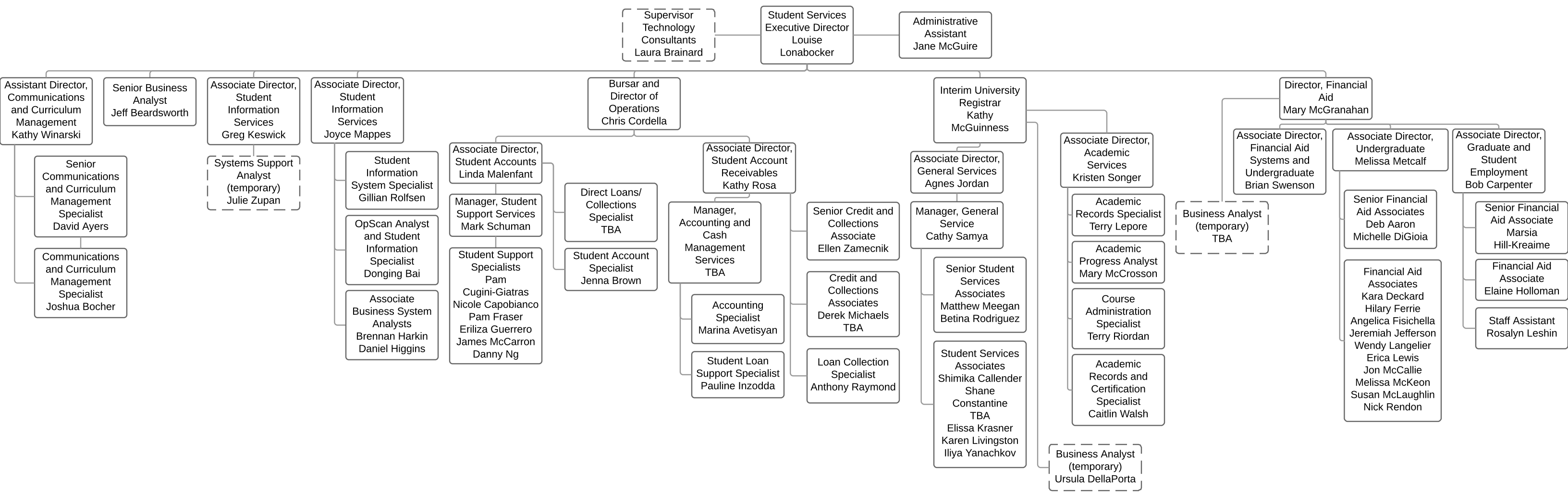
Exam Records in Each Fiscal Year

2012–2013	38,081
2013–2014	44,619
2014–2015	42,381
2015–2016	42,957
2016–2017	41,621

Goals: Scanning Services

- Continue to provide support to faculty members during the transition to the report formats.
- Continue to explore upgraded Remark software, and offer additional services tailored to instructors’ needs in test analysis and reporting.

OFFICE OF STUDENT SERVICES
 ORGANIZATIONAL CHART
 JULY 27, 2017



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