

Persona



Helen Kopter

Parent
47
"Madison is such a big part of our lives. We just want to be there as she needs us"

Objectives

- Provide an excellent level of service to parents.
- Provide convenient processes for parents to make payments on student accounts.
- Comply with the laws and regulations that cover disclosure of student data to parents and guardians.

"Last year Madison lost her part time job and we needed to help out -- I wish we could have paid the bills on-line."

Scenario

View Finances

A parent would like to see the current account status (balances) and the detailed list of transactions. The appropriate results depend upon (1) FERPA compliance, (2) permissions the student gave for disclosure to parent or parents, and (3) other privacy considerations (such as HIPPA if medical data is included in the KSA transaction. The student would have to be registered for authentication and authorization for a level sufficient to provide access.

Online Payments

A parent may wish to make an online payment. This would be similar to online customer service for the student. The parent would need to have additional descriptive information, such as the name of a department rather than the abbreviation, to make the screen content understandable. The system could either wait for the electronic transaction to update or provide a deferment until the payment has been received which provides the same effect as real-time updates.

Specific Payments

A parent may wish to apply payments to specific transaction types such as tuition. A limited set of these would implement this payment application; the payment application would then have to be processed using the same process as a student

request. Note a payment application could prevent the student from using the excess for any other purpose. Subsequent status review could show unapplied payment—a credit balance—and simultaneously a debit balance.

After completing a review of KSA information, the parent wants to know the student's classes and grades. Here a "hand off" to the student records system would be helpful so the parent does not have to logon again.

FERPA regulations protect a student's educational records, which include grades, finances, and discipline records. Physical and mental health records are covered by other policies, federal law (HIPPA), and professional ethics. In general, professionals working in these areas will not release student information except in emergency situations. Students can choose to release information from these records to a third party, but they must usually complete a "Release of Information" (ROI) form.

Concerns

- This implies an authentication and authorization service that includes levels of authentication and levels of authorization adequate for each potential user.
- The authentication and authorization service should support customer service representatives to provide assistance if self-service is not used or the parent has difficulty in its use.
- This will bring a set of problems where student restricts the level of authorization for parents and therefore what parents can see and do.

