

Persona



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Wanda Lyrn

Student

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"I was really embarrassed when my advisor saw some medical stuff in my records."

"My bank has a really simple way for me to review all my information. How hard could it be for the school to do that for us too?"

Scenarios

Student self service

Via a student services application, a student would be able to review all transactions and if implemented, the associated payment application,

Similarly a student should be directed to the student records system for the student to confirm data used in KSAR such as those used to compute tuition or award financial aid.

Similarly a student should be directed to the human resources system to show earning from work study and, if the student has authorized transfer from earnings to KSAR, the amount that has been earned and the amount credited to KSAR. (Note both of these scenarios are based on access to data external to the KSAR system that should be displayed on that system rather than KSAR, but could also be considered a "service" utilized by KSAR for display to a student).

A student would like to know which part of the debits are subject to "deferment" and the status of student loans that are expected to be used (based on KSAR data).

A student recognizing a change in enrolment status and financial aid eligibility wants to know which transactions have been processed.

A student wishes to make an online transaction via a credit or debit card, an electronic transaction using an identified bank (routing number and account number) and an alternate funds transfer system such as PayPal or Western Union.

A student wishes to initiate a refund and direct how the funds should be disbursed.

A student wishes to email a comment or question that includes his identifying information and account number.

Customer service

Customer service should be able to provide similar services via telephone or chat IF the the same information is provided to customer service. Transactions, except those done by the customer service agent as an adjustment would require student authentication and authorization consistent with the transaction.



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Objectives

- To provide student services sufficient to be considered excellent by the student and efficient from the cashier's perspective.
- To ensure the privacy of a student's financial records and transactions consistent with current federal regulations and industry requirements (e.g. PIC standards).
- To provide authorized access to other university data systems needed to provide context to the student's dialogue

Concerns

- The customer service functionality may depend upon the availability of data from other systems, especially student records, student financial aid, and payroll.
- The student identification and authorization system would need to be consistent with the laws, regulations and practices for the type of transaction.
- The data displayed to a customer service agent would have to comply with privacy law and regulations (HIPAA for medical data that could be included in a transaction description is an example. Control of data at the source of the transaction could resolve this issue).

KSA Customer Rating: 1

