Residency Communications

Session #141
October 6, 2009

WHEPSUG 2009
Oshkosh, WI
Your Presenter

Aaron Apel
University of Wisconsin – Madison

- 6 years experience with PeopleSoft
- Support UW Madison Office of the Registrar Enrollment Services Section
Overview

This presentation will focus primarily on the setup and configuration of PeopleSoft’s delivered 3C functionality as used to initiate and monitor communication with students regarding residency requirements.
Agenda

• 3C Checklist and Communication setup

• MS Word Letter Templates

• Student Center Customization
University of Wisconsin - Madison

- UW-Madison enrolls over 40,000 students annually in over 400 programs across campus.
- The Residency Section issues over 3000 individual letters each year.
Oracle PeopleSoft Info

- PeopleSoft v9.0
- Tools Release 8.49.15
- Patched through Bundle 14
The Residency Section of the Registrar’s Office is responsible for determining a student’s residency status for tuition purposes. UW System has provided an auto-res program as part of the online application process to make that determination for a majority of the applicants. However, there are still a number of instances that require manual intervention.
Residency Communications

In these instances, the residency counselors often need to request additional information from the applicant in order to make an accurate residency determination.

This presentation will provide a brief overview of how the Residency Section uses the delivered 3C functionality, in conjunction with the student center, to communicate with the applicants.
Checklist Items

Maintain approximately 150 checklist items specific to each individual piece of information needed to make a residency determination based on each section of the residency statute and particular audience that the statute addresses.

– Sections A(6), A(m), A(3), C, C(m), E, etc.

– Student, Mother, Father, Guardian, Parents (both), etc.
Sustaining Our Investment

Checklist Codes

Maintain approximately 20 separate checklists that are a pre-defined grouping of checklist items specific to each area of the residency statute.

See Residency Checklist Items Master spreadsheet for examples.
Prior to redesigning the business process, the Residency Section of the Registrar’s Office maintained over 80 letter templates used to request information from applicants relating to their residency status for tuition purposes.

After implementing the new business process, we now maintain 5 letter templates that use dynamic text in conjunction with the checklist items, to request the required information.
Residency Business Process Demo

- Placing and editing Checklists
- Placing Letter Codes
- Running Letter Gen
- Merging Letter Gen data extract with Letter Templates
In addition to a redesigned business process for issuing communications to students, the Residency Section also implemented a customization within the Student Center that displays the requested information, information that has already been received, and links to any forms that may be required.

Demo Student Center…
Thank you!
Contact Information

- Aaron Apel
- Info Sys Business Automation Senior
- University of Wisconsin – Madison
- Office of the Registrar
- E-mail: adapel@em.wisc.edu