

## **Council of Directors of Student Academic Services**

**AGENDA | January 8<sup>th</sup> 2024 | 10:30 AM – 12:00 PM**

Zoom Link: <https://okstate-edu.zoom.us/j/94177167318?pwd=8zxxogp05QcepeBUVhFnatJ51QuD5I.1>

**Passcode: 405405**

### **General Education Training: follow up opportunities – Twambi**

S. Baker shared that the training as it stands now is twofold. First, training on how the new general education updates will look for new students and old students in degree works, and second, how training on the new general education trails opportunity offered to our students will be conducted. Chris Francisco in addition to Blake Meyers and Leslie Evans will present at the advising conference on February 7<sup>th</sup>. In acknowledgement of these large changes, there will be follow-up opportunities to reiterate and share documentation of the changes and trainings as well.

L. Evans shared that the same overview that was shared previously in DSAS over the General Education reforms and updates would also be shared at the advising conference. However, she extended the invitation to the colleges to schedule personalized advising training sessions with their advising groups, should there be some team members who are not able to attend the conference. If a college would like to schedule a personalized session, they can reach out to Leslie and Blake via email.

T. Kerstetter mentioned that 143 attendees have currently registered for the advising conference, and she highly recommends that the colleges encourage their advisors to continue to register. T. Kerstetter will reach out for further trails training in March and April to answer the questions: “How should an advisor view the trails,” “how should they talk about the trails to students,” “and how can this be catered toward specific colleges?”

### **Shared Advisor Positions List – Shannon Baker**

S. Baker highlighted that the purpose of this form is to share a running list of advisor positions that are currently open. This list, hopefully, will help the group better understand the market for hiring as they search for new team members. In addition, this list could help the group relocate advisors who may fit better in a position in a different college/unit. If colleges would like to add their positions to this list, they may follow the link and do so. The group agreed that the removal of the positions, once filled, would be managed by Audrey and that a start date and a Req ID number column should be added to the list.

A. Martindale also shared that it may be helpful to create a Teams for the DSAS group where important documents like this one can be shared. This would help group members easily find these documents/links.

### **Rotational Highlight – Shannon Baker**

S. Baker gave a summary of the monthly highlight idea. Groups within DSAS will have the opportunity to share information about their unit and how they contribute to the group as a whole. S. Baker share the highlight sign-up sheet.

### **Residency Requirement Policy Review – Mike Hunsucker**

S. Baker introduced Mike Hunsucker to share updates on residency policy. M. Hunsucker shared that when he stepped into his current role, the residential requirement policy could only be expressed verbally, there were no written documents to support the requirement, and so in this meeting, he shared his screen of the policy that he and his team wrote to document the policy. M. Hunsucker expressed that the policy could use the group's feedback over the policy requirements, the definitions of "First-time undergraduate students," "Transfer students," and "University Housing," and over the requirement exceptions.

M. Hunsucker explained that S. Baker would share out the policy to the group soon. He then opened the floor for questions.

L. Millis asked if the data to support the statement that students who live on campus perform better academically than students who live off campus could be shared. L. Burns explained that the data can be reviewed and shared.

The group offered feedback on terminology of the policy in order to precisely define and holistically address the needed requirements of the Housing Residency Requirements including the following:

- The definition of a transfer student. The group explored using the term "earned" instead of "attempted" regarding the number of credit hours earned post-high school graduation.
- The title of the policy should include the term "Housing" to differentiate from the institutions' out of state residency requirements.

The group agreed to reference another policy, possibly the admissions policy, when defining the classifications of a transfer student. N. Holmes identified that the housing residency term length requirement wasn't specified in the current policy and that there should be terminology to define it. M. Hunsucker specified that they would like to specifically target the requirement for on-campus residency to be August to May, not necessarily May to December. B. Morris suggested that the terminology define it as

“through their first spring semester.” She also requested that the policy either add an exemption for OSU-Tulsa students, or state that it only applies to OSU-Stillwater students.

Moving on to the policy section of the document, A. Martindale expressed concern for the terminology “The policy is applicable insofar as rooms are available in space to which the university has access.” The issue being that this terminology suggests students may be forced to live in conditions not conducive to their needs, simply because it is a space the university has access to. M. Hunsucker clarified that the exemptions would also cover these students who may have specific needs due to a disability that university housing may not be able to accommodate.

K. Meints added a suggestion that the policy should include specifications for when a student can expect to hear back on their housing status according to their admission date. To avoid frequent changes to the policy document itself, the terminology could be kept general such as “by the posted dates.”

A. Martindale suggested that since the incoming first-year students will become the new housing priority over transfers or returning students, there should be a statement in the policy that specifies this. M. Hunsucker agreed to the benefit but expressed hesitation since this is more procedure than it is policy. S. Baker suggested that M. Hunsucker take the notion back to Amber Manning-Oulette to discuss and asked that he determine a timeline so that S. Baker could bring the policy back to the group and have it finalized by the time it is needed.

In the exemption portion of the document the group agreed that there should be a statement that specifies that the following students who meet one or more of the exemption requirements, must fill out and submit the exemption form for approval.

S. Baker will communicate with M. Hunsucker on the date for the next scheduled DSAS meeting. In addition, she determined that the group will likely need to call for an emergency meeting to vote on the finalization of the policy by the deadline needed (prior to mid-February).

### **Bursar Presentation – Laurie Beets**

L. Beets shared a presentation with the group over holds and cancellation policies and procedures. The mission of the bursar’s office is to collect the accounts receivable while aligning with the goals and strategies of Student Success and Retention at OSU. The content of the presentation may be found in the documents attached following the meeting minutes.

Concluding her presentation, L. Beets opened the floor for questions.

K. Seuhs asked if there was a target number that a student’s balance needs to be under so that the hold on their account may be lifted. L. Beets explained that there is no definitive target number because every student case is different, however, typically holds

are removed and cancellation is no longer a concern for students with a balance of less than \$500.

S. Baker asked if a student who received a cancellation notice letter stopped attending classes, thinking they were going to be canceled, but were not later canceled, would that student be penalized.

L. Beets answered that students who receive the cancellation notices, who were not cleared for third party funding, are sent another email to explain that they have been granted a one-time exception for X amount and their semester enrollment has been retained.

S. Baker asked if there is a representative on staff with the bursar that the colleges should reach out to when inquiring about their students?

L. Beets answered that Jessica Bates would be the first line of contact, but that it would be helpful to copy herself and Kim Miller as well.

S. Baker asked then if it would be allowed for the colleges to reach out about a particular student so that they could then, more definitively, inform the student of their cancellation status according to their account balance.

L. Beets affirmed that it is allowed and encouraged.

A. Martindale asked if there was a way to include the assigned advisor on the list of students on cancellation shared with the colleges.

L. Beets explained that she was unsure, but that maybe they could work with IRA to think through a way to solve the issue.

S. Baker suggested that she, L. Beets, and potentially a representative from IRA, schedule time to sit down to talk through some of the feedback from the meeting, then later, perhaps in a smaller group meeting, talk through some of the details to land in a place that benefits everyone. L. Beets agreed.

### **December Messaging Update – Shannon Baker**

S. Baker reminded the group that in the last meeting the group decided that it would be highly beneficial to send communications out to students who were not yet enrolled for Spring. We were able to quickly get that messaging reading with instructions for the different types of holds, or for students without holds. This was sent out through the Office of Student Success for simplicity and to accommodate for the quick turnaround. There was a lot of positive feedback via emails from students, thanking the team for the reminder. N. Holmes shared that any feedback received from students was forwarded onto the appropriate colleges. There were no negative comments from students, only positive explanations about their enrollment plans.

S. Baker shared that Cowboy Charlie also sent out a text to first year students who had not yet enrolled to check-in on them. About 60 students expressed concerns, and our advising

team is reaching out to these students to offer supports. Charlie also check-in with them over break asking how their break was going, any concerning responses were followed up with campus resources/supports.

Meeting adjourned at 12:25 p.m.

Minutes recorded by A. Pinion

## **Attachment # 1**

### **Bursar Information for DSAS 1/8/2025**

The Bursar Office is committed to support student success and retention. Processes are continuously evaluated (especially communication strategies) to ensure alignment with OSU's mission to retain and support students effectively. To further assist students facing financial challenges, we proactively reach out to those with outstanding balances through a variety of communication channels. This includes in-person meetings, monthly billing statements, hold notification emails, emails encouraging to make contact to discuss their account balance and phone calls. We partner with financial planning coaches, colleges, and financial aid to explore assistance. We understand that striking the right balance between student retention and maintaining an acceptable level of Accounts Receivable is a complex challenge. However, we remain committed to helping students navigate this process and not negatively impact students by increasing their debt to a level that would be difficult to overcome.

### **3-0335 Payment of Student Fees, Tuition, and Charges**

C. The passing of a check (electronic or paper) to the University which is not honored by the financial institution against which it is drawn may result in the cancellation of the student's enrollment for failure to pay a delinquent account, notification to the Student Conduct Office, and may be given to the District Attorney's office to collect.

### **Enrollment Cancellation Historical Summary:**

<b>Enrollment Semester Cancelled</b>	<b>Beginning # on Cancel List</b>	<b>Enrollment Cancelled #</b>
Fall 202260	2,542	26
Fall 202360	2,584	41
Fall 202460	2,804	56
Spring 202220	225	-
Spring 202320	311	2
Spring 202420	284	3
Spring 202520	376	4
Summer 202240	98	3
Summer 202340	96	1
Summer 202440	117	1

C. The passing of a check (electronic or paper) to the University which is not honored by the financial institution against which it is drawn may result in the cancellation of the student's enrollment for failure to pay a delinquent account, notification to the Student Conduct Office, and may be given to the District Attorney's office to collect.

#### **Spring 202520 enrollment cancellation information:**

Original list 376 students

Cancelled 4 (2 returned checks, unfilled agreement; 2 paid the account the evening cancelled enrollment and have re-enrolled)

Bursar Office communications below regarding balance due and potential spring 2025 enrollment. This does not include colleges, financial planning coaches, and financial aid communications.

- 9/1/24, 10/1/24, 11/1/24, 12/1/24, 1/1/25 – New billing statement issued

- 9/20/24, 10/20/24, 11/2024 - Charging hold notification email sent (SLATE)
- 9/20/24, 10/20/24, 11/20/24 - Registration hold notification email sent (SLATE)
- 11/24/24 - Potential spring 2025 enrollment cancellation email sent (SLATE)
- 11/22/2024- Potential spring 2025 enrollment cancellation email sent -deadline December 13<sup>h</sup> (SLATE)
- 12/02/2024- Potential spring 2025 enrollment cancellation email sent -deadline December 13<sup>h</sup> (TouchNet)
- 12/5/2024 - Potential spring Enrollment Cancel calls made to: 405xxxxxx. This is a reminder of your OSU bursar account balance. To avoid consequences as outlined in previous email notifications, your bursar account must be paid current no later than 5:00 PM Friday, December 13<sup>th</sup> to avoid Spring Spring enrollment cancellation. If you have questions, please email [bursarpop@okstate.edu](mailto:bursarpop@okstate.edu) or call 405-744-5998.
- 12/9/2024- Potential spring 2025 enrollment cancellation email sent -deadline December 13<sup>h</sup> (TouchNet)
- 12/23/24, 1/2/2025 - Cancellation email last chance and telephone calls (Bursar financial counselor email) and calls made.
- 1/6/2025: Email communication spring enrollment cancelled (also sent certified letters)

**Hold notification communication:**

You don't often get email from [bursar@okstate.edu](mailto:bursar@okstate.edu). [Learn why this is important](#)



Dear ,

OSU understands you may encounter financial difficulties. We're here to help encourage you to reach out to discuss payment options.

You have an outstanding account balance that could delay your spring registration or effect schedule changes. OSU policy mandates that outstanding balances be cleared prior to enrolling in future semesters. If enrollment occurs after the first day of class, there will be a \$100 late fee.

If you've paid your account balance, please disregard this notice.

**We want you to be aware of actions you can take now to ease this situation:**

- Review your account balance and/or make an online payment if necessary at [my.okstate.edu](http://my.okstate.edu). Click **OSU Stillwater/Tulsa Bursar Account** under Quick Links.
- Confirm all payments, scholarships and financial aid have been received.
- Access the Financial Aid Portal on [my.okstate.edu](http://my.okstate.edu).
  - Make sure your aid has been accepted.
  - Check that requested financial aid documents have been submitted.
  - Accept both Title IV Authorization questions to pay all charges on account. If declined, you may owe a balance to the University after receiving your refund.
- Check with the [Office of Scholarships and Financial Aid](#) to see if you qualify for need-based aid; if not, you may be eligible for other

assistance, such as student or parent loans, to help cover your educational expenses. Please remember the parent loan is based on credit approval.

- Keep in mind that federal regulations prohibit the use of federal aid to cover a past-due balance from a previous academic year.
- Pay in person at **113 Student Union** (OSU Stillwater Campus) or the **1st floor of North Hall** (OSU-Tulsa Campus).

Please contact your [academic advisor](#) regarding your course selection for future semesters whether or not you have an outstanding balance. Keep in mind you are eligible to visit with your advisor prior to your scheduled enrollment date or after the enrollment date has passed.

We want you to continue your educational endeavors at OSU. Contact us to discuss your options at [bursar@okstate.edu](mailto:bursar@okstate.edu) or by calling [405.744.5993](tel:405.744.5993) (Stillwater) or [918.594.8320](tel:918.594.8320) (Tulsa) for assistance.



**Office of the Bursar**  
Oklahoma State University  
113 Student Union | Stillwater, OK 74078  
405-744-5993 | [bursar.okstate.edu](mailto:bursar.okstate.edu)



**Enrollment cancellation communication:**



Dear Laurie,

OSU understands you may encounter financial difficulties. We're here to help encourage you to reach out to discuss payment options.

You have an outstanding account balance that could result in the cancellation of your spring 2025 enrollment. If enrollment occurs after the first day of class, there will be a \$100 late fee.

If you have paid your account balance, please disregard this notice.

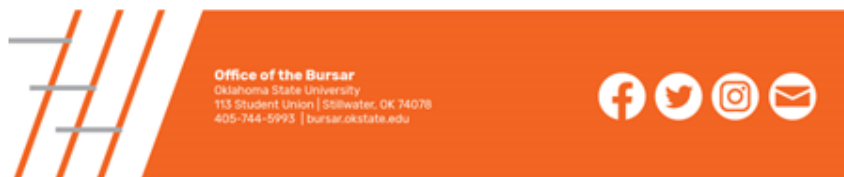
**We want you to be aware of actions you can take now to ease this situation prior to the Friday, December 13, 2024 deadline:**

- Review your account balance and/or make an online payment if necessary at [my.okstate.edu](https://my.okstate.edu). Click **OSU Stillwater/Tulsa Bursar Account** under Quick Links.
- Confirm all payments, scholarships and financial aid have been received.
- Pay in person at **113 Student Union** (OSU Stillwater Campus) or the **1st floor of North Hall** (OSU-Tulsa Campus).
- Access the Financial Aid Portal on [my.okstate.edu](https://my.okstate.edu).
  - Make sure your aid has been accepted.
  - Check that requested financial aid documents have been submitted.

- o Accept both Title IV Authorization questions to pay all charges on account. If declined, you may owe a balance to the University after receiving your refund.
- Check with the [Office of Scholarships and Financial Aid](#) to see if you qualify for need-based aid; if not, you may be eligible for other assistance, such as student or parent loans, to help cover your educational expenses. Please remember the parent loan is based on credit approval.
  - o Keep in mind that federal regulations prohibit the use of federal aid to cover a past-due balance from a previous academic year.

OSU policy mandates that outstanding balances be cleared prior to enrolling in future semesters. If you have a past due balance and it is not paid by the **Friday, December 13, 2024 deadline**, your spring enrollment is subject to cancellation. **If it is necessary to cancel your enrollment due to your bursar account status, you will receive official notification of your spring course(s) cancellation(s) via certified mail in January.**

We want you to continue your educational endeavors at OSU. Contact us to discuss your options at [bursar@okstate.edu](mailto:bursar@okstate.edu) or by calling [405.744.5993](tel:405.744.5993) (Stillwater) or [918.594.8320](tel:918.594.8320) (Tulsa) for assistance.



### **Fall 202460 enrollment cancellation information:**

Original list 2,804 students

Cancelled 56 (Several on the list with returned checks, unfulfilled agreements, accounts previously at external collection agencies, financial aid suspended, an athlete no longer on the football team for Fall, and 1 bankruptcy filed in June)

Bursar Office communications below regarding balance due and potential Fall 2024 enrollment. This does not include colleges, financial planning coaches, and financial aid communications.

- 6/1/24 – New billing statement issued
- 6/20/24 - Charging hold notification email sent (SLATE)
- 6/20/24 - Registration hold notification email sent (SLATE)
- 6/24/24 - Potential fall 2024 enrollment cancellation email sent (SLATE)

- 7/1/24 – New billing statement issued
- 7/16/24- Potential fall 2024 enrollment cancellation email sent -deadline July 30<sup>th</sup> (SLATE)
- 7/29/24 - Potential Fall Enrollment Cancel calls made to: 405xxxxxx. This is a reminder of your OSU bursar account balance. To avoid consequences as outlined in previous email notifications, your bursar account must be paid current no later than 5:00 PM Thursday, August 1st to avoid Fall enrollment cancellation. If you have questions, please email [bursarpop@okstate.edu](mailto:bursarpop@okstate.edu) or call 405-744-5998.
- 8/1/24 – New billing statement issued
- 8/8/24 - Cancellation email with final deadline 5PM 8/9/24 sent (Bursar financial counselor email)
- 8/12/2024: Email communication Fall enrollment cancelled (also sent certified letters)

Attachment #2 – Policy 3-0335 “Payment of Student Fees, Tuition and Charges”

[Policy 3-0335 Payment of Student Fees, Tuition, and Charges updated Dec 2024](#)