The Cashless and Paperless Business Office

Speaker: Tony Newland
Institution: The Ohio State University
Date: April 9th, 2014
Abstract

- The Ohio State University no longer accepts cash as a form of student payment, and does not generate static billing statements for students with associated emails.
- The result: numerous operational efficiencies including eliminating trips to the bank, increasing cash flow, less dependence upon external vendors, fewer customer inquiries, and of course, cost savings!
Goals and Objectives

- We will explain how we marketed changes to students as well as the administration, impact of the changes on students, resulting efficiency and savings to the institution, and other intended (as well as a few unexpected) impacts
- We will share our strategy for building partnerships with colleagues across a large, diverse university community to gain support for change
- We will demonstrate our self-service online, dynamic student statement of account, and provide additional insight in support of going cashless
- We will explore the potential advantages which include: the elimination of armored car service, more efficient use of staff, less dependence upon external vendors, overall increase in operating efficiency, streamlined reconciliation procedures, decrease in scrutiny by outside agencies, and slightly more relaxed physical security requirements resulting from a “no cash” environment
Overview of OSU

- The Ohio State University is a land grant (and sea grant) institution located in Columbus, Ohio, currently educating nearly 65,000 students each semester on five campuses.
- Serve diverse constituencies: Medical, Dentistry, Veterinary, Pharmacy, Law, Agriculture, other graduate and professional, and of course, undergraduates.
- Main Columbus campus is the equivalent of a small city with a population of 100,000.
Office of the University Bursar

- Formerly two offices:
  - Fees and Deposits
  - Accounts Receivable/Loans and Collections
- Merged in 2007 into the Office of the University Bursar
- Implemented PeopleSoft SIS in 2009
- Added Student Services Center (one-stop) in 2009
- Relocated to new Student Services Building in 2010
Challenges

Billing

- Creating and mailing paper invoices to students cost over $200,000 annually in 2003
- Maintaining up-to-date addresses for college students was problematic, resulting in a large volume of returned mail
- Static invoices were frequently out-of-date when received by the student

Cash Handling

- Personal safety – especially international students carrying large amounts of cash
- Strong internal controls surrounding cash payments –
  - 2 people required to count cash
  - Receipt must be issued
- Physical security requirements in a cash environment
Implementation of paperless

- Original implementation in 2003
  - Used a service provider
  - “Cold turkey” conversion
  - Paper bills were sent only if students did not pay their balance due by the end of the term
- Later improvements
  - Eliminated service provider
    - IT staff developed a real-time lookup in PeopleSoft that delivers a PDF through self-service
  - Several “facelifts” to the online statement of account
Implementation of cashless

- Implemented in summer, 2009
  - Highly publicized prior to summer
  - Students presenting cash that summer were issued a strong reminder of the new policy and beginning autumn quarter, cash customers were referred to a nearby convenience store for money orders

- Later improvements
  - Eliminated departmental deposits at our office
  - Implemented remote capture for check deposits
  - These two added initiatives allowed us to discontinue armored car service and trips to the bank.
Timeline

- Paperless implemented in 2003, and cashless implemented in 2009.
- Many other concurrent initiatives, including online payments, PeopleSoft student implementation, opening of a One Stop, and move to a new building.
- Bottom line: with focus, implementation of either or both initiatives could be complete in within a year.
No Bills

- What we were doing before
- What we did after implementing
- How we got there
- Advantages
- What made it successful
- What we are doing today
- How you can get there
No Bills

- What we were doing before
  - Mailing printed statements each time there was a schedule change
    - Found that students changed their schedule an average of 7 times per term.
    - 7 times per term x 60,000+ students = lots of $$$$$ &
No Bills

- What we did after implementing
  - No printed bill
  - No static online bill
  - Statements of account were presented online and changed in real time with registration activity
  - Date of registration activity drove the due date
  - Common due date for registration activity
    - Example: All registration activity up to 5 days prior to the start of classes has the same due date of the first day of classes.
  - Students and parents were expected to know and make payment by the due date.
  - Emails were sent to students when their amount due increased
  - Collection bills mailed to students that didn’t pay by the end of the term
  - Guardians were presented the full bill with details
No Bills

- How we got there
  - Partnered with payment service provider to develop technical parts
    - Students could view their statement online and make an electronic payment by double clicking a link on their statement of account
    - Electronic payment showed up in real time on their statement of account (OSU did not accept credit cards at that time)
  - Extensive communications sent AU02
    - Direct communication to parents and students
    - Ads in student newspaper and other media outlets
    - Direct communication to other offices with student and parent contact or a vested interest in the change
      - Registrar
      - Financial Aid
      - Student Advocacy
      - Admissions
      - International Affairs
No Bills

- How we got there (continued)
  - Winter 2003 first quarter of mandatory online bills. No bills were mailed.
    - Any increase in amount due triggered an email to the student with a link to their statement of account
    - Statement of account looked exactly like the bill that students and parents were receiving in the mail
    - Statements of account updated in real time and due date for all students and charges are standardized
    - OSU was not the first to present bills online, but was the first to make it mandatory
No Bills

- Advantages
  - Charges and personal payments updated in real time (OSU did not accept credit cards at that time)
  - Saved OSU $190,000 annually in stamps alone
  - Additional savings such as letterhead, printing, bill validation, and address maintenance
    - Our bill printing job ran for over 12 hours!!
  - Encouraged online payments. Online payments jumped from $10.5 million in FY2002 to $59 million in FY2003 and then to $107 million in FY2004
    - Could see payment posted in real time
    - Very convenient since they were already online looking at bill
No Bills

- What made it successful?
  - Buy in from across campus
    - Other departments, senior administration, students, parents, etc.
  - Multiple streams of communication
    - Orientation
    - Postcard over the Summer
    - University Calendar
    - Multiple websites (Buckeye Link, Student Services Center, Bursar’s Office, Registrar’s Office)
    - TV monitors in the Student Services Center
    - Email tag lines
    - Recorded phone messages when students call in.
    - Make the due date easy to remember!!!
No Bills

- What made it successful? (continued)
  - Within a year of implementation introduced a guardian feature
    - Allowed individuals that the student authorized to access their online statement of account and make an online payment
    - Access completely managed by the student
  - Clear communication of advantages to students and OSU
    - Real time updates for students
    - Cost saving for University which meant keeping tuition costs down for students
No Bills

- What we do today
  - Charges and payments are still updated in real time.
  - Emails are only sent to those students that have not paid by the due date. The expectation for all students is that they view their statement of account and pay their balance due by their due date.
  - Students can still grant guardians access through a 3rd party vendor however only the account balance is presented to the guardian.
  - Common due date of 7 days prior to the start of classes for all registration activity up to the due date.
  - Collection bills mailed to anyone 90+ days overdue
No Bills

- What we do today (continued)
  - Recent changes to the online statement of account
    - Added credit hours for the term selected.
    - Added pending financial aid as a payment that was taken into account for the amount due for the term.
  - If a student has past due or future due charges a second page is populated with the details of each.
  - Unapplied payments are separated out into their own section. The section only appears to the student if the student has an unapplied payment.
  - Expanded messages that appear on statement of account to increase communication.
# Statement of Account

**Autumn 2011**

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**Balance Due As Of Today:** $0.00

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### Autumn 2011 Charges, Payments, and Adjustments

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Transaction Date</th>
<th>Due Date</th>
<th>Charges</th>
<th>Payments/Adjustments</th>
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<tbody>
<tr>
<td>COTA Bus Service Fee</td>
<td>8/4/2011</td>
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<td>Recreational Fee</td>
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<td>8/15/2011</td>
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<tr>
<td>General Fee Law</td>
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<tr>
<td>Instructional Fee Law</td>
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<td>8/15/2011</td>
<td>$12,620.00</td>
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<td>Pending Financial Aid</td>
<td>8/4/2011</td>
<td>8/15/2011</td>
<td>$22,737.00</td>
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</tbody>
</table>

Subtotal  $13,099.00  

**Pending Financial Aid will show up as a payment.**

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### Statement Summary

- **OSU ID:** 200019555
- **Statement Date:** 8/4/2011
- **Autumn 2011 Enrollment Hours:** 16.00

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For questions regarding this Statement of Account, please contact the Student Service Center (SSC) at 614-292-6300 or toll free 800-678-6440 and/or ssc@osu.edu.

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**Notes:**

- Financial Aid is listed as pending on your account until about 10 days prior to the start of the term. If aid does not appear as a credit on your account, check your To Do List. Once aid is disbursed, the pending status will be removed.
- Autumn fees are due September 14. Late fees will be assessed after that date. Student Health Insurance and the Student Legal Services fee should be waived (if desired) by September 14.
- You may enroll in TOPP until September 23rd, however late fees may apply if you do not enroll by September 14. We cannot apply current term financial aid to a prior term balance. If you have a past due balance from a prior term, you must pay it in full.

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Fee types such as Law, Undergraduate and Graduate will be indicated in the Transaction column.

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Note the Credit Balance in the Term Balance field. The credit balance is indicated by the parenthesis () around the dollar amount.
### Statement of Account

#### Autumn 2011

**Statement Summary**
- **OSU ID:** 100216555
- **Statement Date:** 8/4/2011
- **Autumn 2011 Enrollment Hours:** 13.00

**Balance Due as of Today:** $4,353.50

#### Past Unpaid Charges:
- **Amount Due:** $0.00

#### Current Charges:
- **Amount Due:** $4,353.50

#### Future Charges:
- **Amount Due:** $4,353.50

### Charges, Payments, and Adjustments

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Due Date</th>
<th>Charges</th>
<th>Payments/Adjustments</th>
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</thead>
<tbody>
<tr>
<td>COTA Bus Service Fee</td>
<td>8/4/2011</td>
<td>$9.00</td>
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<tr>
<td>Student Activity Fee Undergrad</td>
<td>8/4/2011</td>
<td>$25.00</td>
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<td>Student Union Facility Fee</td>
<td>8/4/2011</td>
<td>$81.00</td>
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</tr>
<tr>
<td>Recreational Fee</td>
<td>8/4/2011</td>
<td>$82.00</td>
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<tr>
<td>Learning Technology Fee Bus UG</td>
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<tr>
<td>General Fee Undergrad</td>
<td>8/4/2011</td>
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<tr>
<td>Program Fee/Grad Business</td>
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<td>Instructional Fee Undergrad</td>
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<tr>
<td>Non-Resident Fee Undergrad</td>
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<td>Payment Plan Installment</td>
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<td>TOPP Enrollment Fee</td>
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<tr>
<td>Transfer to Tuition Opt Pay Pl</td>
<td>8/4/2011</td>
<td>$0.00</td>
<td></td>
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</tbody>
</table>

**Subtotals**
- **Charges:** $17,384.00
- **Payments:** $8,687.00
- **Balance:** $8,697.00

### Unapplied Payments

<table>
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<tr>
<th>Transaction Description</th>
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<td>H - Lockbox Scholarship Check</td>
<td>8/4/2011</td>
<td>$4,353.50</td>
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</tbody>
</table>

For questions regarding this Statement of Account, please contact the Student Service Center (SSC) at 614-292-6300 or toll free 800-678-6440 and ssc@osu.edu.

**NOTES:**
- Financial Aid is listed as pending on your account until about 10 days prior to the start of the term. If aid does not appear as a credit on your account, check your To Do List. Once aid is disbursed, the pending status will be removed. Autumn fees are due September 14. Late fees will be assessed after that date. Student Health Insurance and the Student Legal Services fee should be waived (if desired) by September 14.
- If you enroll in TOPP until September 23rd, however late fees may apply if you do not enroll by September 14. All TOPP installations must be paid on time to avoid late fees, drop for non-payment, and to ensure registration for future terms.
### Statement of Account

**Autumn 2011**

#### Statement Summary
- **OSU ID:** 100125500
- **Statement Date:** 8/4/2011
- **Balance Due As Of Today:** $12.00
- **Fall 2011 Enrollment Hours:** 18.00

#### Charges, Payments, and Adjustments

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<thead>
<tr>
<th>Transaction</th>
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<th>Charges</th>
<th>Payment Adjustments</th>
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</thead>
<tbody>
<tr>
<td>COTA Bus Service Fee</td>
<td>8/2/2011</td>
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<tr>
<td>Student Activity Fee</td>
<td>8/1/2011</td>
<td>$25.00</td>
<td></td>
</tr>
<tr>
<td>Student Legal Services Fee</td>
<td>8/1/2011</td>
<td>$40.00</td>
<td></td>
</tr>
<tr>
<td>Psychology Program Fee</td>
<td>8/1/2011</td>
<td>$81.00</td>
<td></td>
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<tr>
<td>Student Union Facility Fee</td>
<td>8/1/2011</td>
<td>$21.00</td>
<td></td>
</tr>
<tr>
<td>Recreational Fee</td>
<td>8/1/2011</td>
<td>$82.00</td>
<td></td>
</tr>
<tr>
<td>General Fee Undergrad</td>
<td>8/1/2011</td>
<td>$126.00</td>
<td></td>
</tr>
<tr>
<td>Instructional Fee Undergrad</td>
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<td>$242.00</td>
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<td>Transferred To METRO HHS</td>
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<td>$3,078.00</td>
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<tr>
<td>Web Payment</td>
<td>8/2/2011</td>
<td>$25.00</td>
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</tr>
</tbody>
</table>

**Subtotals:** $3,236.00

**Total:** $3,225.00

#### Outstanding Charges

<table>
<thead>
<tr>
<th>Term</th>
<th>Transaction Date</th>
<th>Due Date</th>
<th>Charges</th>
<th>Amount Due</th>
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</thead>
<tbody>
<tr>
<td>Abstract Binding Fee</td>
<td>8/20/2011</td>
<td>6/20/2011</td>
<td>$12.00</td>
<td>$12.00</td>
</tr>
</tbody>
</table>

**Future Charges:**
- Student Union Facility Fee
- Autumn 2011: $51.00
- Autumn 2011: $82.00

**Past Unpaid Charges:**
- Abstract Binding Fee
- $12.00

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For questions regarding this Statement of Account, please contact the Student Service Center (SSC) at 614-292-0300 or toll free 800-678-5440 and e-mail ssc@osu.edu.

**Notes:**
- Financial aid is listed as pending on your account until about 10 days prior to the start of the term. If aid does not appear as a credit on your account, check your To Do List. Once aid is disbursed, the pending status will be removed.
- You may enroll in TOFP until September 3rd, however late fees may apply if you do not enroll by September 14. Autumn fees are due September 14.
- Late fees will be assessed after that date. Student Health Insurance and the Student Legal Services fee should be waived (if desired) by September 14.
- If your sponsor fails to pay the agreed upon amount, you will be held responsible for any unpaid charges.
- We cannot apply current term financial aid to a prior term balance. If you have a past due balance from a prior term, you must pay it in full.

Unpaid Charges From Other Terms ARE included in the Balance Due as of Today total.
No Bills

- How you can get there
  - Keep it simple
    - We only changed the delivery method. The look and feel of the bill did not change. It was exactly what students and parents were used to receiving in the mail
    - Make your due date something that is easy to remember so that students, staff, and parents know it without having to look it up
  - Consider a target implementation date and make sure you have the time and resources to make it
No Bills

- How you can get there (continued)
  - Generate buy in across campus
    - The more support you have, the easier it will be to implement and carry forward
  - Clearly communicate the advantages of online dynamic billing and what is changing
    - Tailor this to your audience.
      - When addressing budget or accounting groups maybe stress the cost savings.
      - When addressing academic groups stress the increased student and parent benefit of getting real time information
      - People get upset when they are caught off guard so try to minimize this
No Bills

- How you can get there (continued)
  - Be prepared to address concerns and questions of going to dynamic paperless billing.
    - Our student newspaper, The Lantern, interviewed students in the fall of 2002 and one of the concerns voiced by students was how their parents would get the bills so they could pay.
  - Consider what statistics would be useful to make your case
    - How many parents or students do not have access to a computer
    - What is the potential cost savings
No Cash

- What we were doing before
- What we did after implementing
- How we got there
- Advantages
- What made it successful
- What we are doing today
- How you can get there
No Cash

- What we were doing before
  - Accepted cash for tuition payments only
  - Printed receipts for all cash tuition payment transactions
  - Had a vault with a $5,000 on hand reserve
    - Vault counted daily
  - $500 cash box for each cashier (5-7 boxes total)
    - Cash boxes counted at the end of each shift
  - Provided change services for Registrar and BUCKID offices
  - Accepted cash and check deposits from other departments
  - Armored car pickup
No Cash

What we did after implementing

- No cash accepted for tuition payments (Regional campuses excluded)
- No receipts printed
  - Students and parents paying via check were advised that their cashed check served as their receipt
  - Check payments were posted as they waited so they could see the payment posted on their statement of account before they left the office
- No cash reserve maintained
- No change services for other departments
- Still had cash and check deposits from other departments
  - Deposits bags were sealed, no need to verify
  - Department recorded deposit in GL and prepared deposit slip
- Still needed armor car service for check deposit and department deposits
No Cash

- How we got there
  - November 2007 discussions began of cashless concept
  - February 2008 began research of going cashless
  - March 2008 formally presented to Treasurer
  - June 2008 formally presented to Senior Vice President of Business and Finance
  - In the summer of 2008 we began discussing proposal with other offices such as Registrar, Financial Aid, Enrollment Services, Academic Services, and Internal Audit.
    - Registrar’s Office really embraced the idea and also went cashless for transcript payments in the fall of 2008
  - WI09, SP09, and SU09 any student paying via cash was told that this was the last time they could pay in cash.
No Cash

- How we got there (continued)
  - Heavy communication effort in SP09
    - Office of International Affairs.
    - Orientation
    - University Publications (OSU Weekly & The Lantern)
    - Email blasts
    - Bursar Website
    - Cashless Posters
    - OUB Office Brochure
No Cash

How we got there (continued)

- SU09 rollout of no cash. Coincided with our PeopleSoft SIS implementation and our Student Service Center opening.
No Cash

- How we got there (continued)
  - Students presenting cash for payment after July 1st 2009 were instructed to pay online (preferred), check, money order, or cashier's check.
  - Autumn of 2009 cash boxes and vault were cleared out and closed. No cash kept on hand.
  - No major pushback.
No Cash

- **Advantages**
  - Less exposure and risk for students that carried large sums of cash into the office to make payment.
    - Students were not always discreet when carrying around thousands of dollars in cash for a tuition payment.
  - Eliminated the need for internal cash controls such as counting the vault and cash boxes
    - Cash was a very small percentage (1/2 %) of the total dollars received but still required internal controls to accept it
  - Relaxed physical environment
    - Bullet proof glass removed
  - Freed up managers and staff
    - Verifying cash was very time consuming.
    - Did not have a cash counting machine so on fee payment deadlines a good portion of the day could go to counting cash and verifying a deposit.
No Cash

- What made it successful
  - Involvement and support from senior leadership.
  - Involvement and support from other offices and OUB staff
  - Clear and extensive communication on when and why it was happening.
  - Had already eliminated other cash related functions like giving out change to students and staff and cashing personal checks
No Cash

- What we are doing today
  - Still no cash accepted!!
  - Remote capture of checks.
  - No armored car pick up.
  - No longer a deposit center for other departments.
No Cash

- How you can get there
  - Evaluate what cash related functions you currently do and try to reduce
    - Cash personal checks
    - Change services
    - Deposit center
    - Tuition payments
    - Petty cash fund
No Cash

- How you can get there
  - Do your homework
    - Research what the impacts would be
      - Weigh the pros and cons
        - Turning away cash payments
    - Research what other schools are doing
      - Use other success stories as support
  - Vet your proposal through senior leadership and other support offices for buy in
No Cash

- How you can get there
  - Give plenty of warning to students, parents, and other offices of the change
    - Explain the whys up front if possible
    - Be prepared for the questions that will be asked and come up with standard responses so your message is consistent
  - Have an extensive communication plan
    - Minimize those surprised by the change
No Cash

- How you can get there
  - Stick to your policy
    - You may have some bumps and challenges but stay firm
Benefits

- **Streamlining**
  - Student/guardian always views current, rather than static, balance
  - Slightly more relaxed physical security
  - Less intensive scrutiny by auditors, IRS
  - Fewer customer inquiries about “balance due”

- **Reducing costs**
  - Less dependence on external vendors and services
    - No billing system
    - No cashiering system
    - No armored car service
  - More efficient use of staff
  - Students/parents more likely to use self-service and pay online
Benefits (continued)

- More inviting space (no bullet proof glass or teller windows)
- Expedited service to students/payers who no longer have to wait in line while cash is counted
- No receipts printed
  - check payments are posted promptly and reflected in online statement of account
  - Online payments generate email receipt
- No cashiers or cashiering system – we post payments directly into PeopleSoft using the group post function and support reconciliation with PeopleSoft queries
- Less scrutiny by auditors (cash audits) and IRS (form 8300)
- No more trips to the bank!
Benefits (continued)

- No monthly billing process, external billing vendor, or emails sent
- More efficient use of staff
  - Eliminated extended hours
  - Created enhanced opportunities and job enrichment for staff
    - (Knowledge workers vs. transaction processors)
  - Increased productivity in other areas – problem solving, continuously improving processes, data analysis and reporting
  - Improved customer service and responsiveness
- Paved the way for other improvements, including online credit card payments with a convenience fee
- Cost savings exceed $500,000 annually
Additional Benefits

- More students/families pay online
- Clear communication to students regarding payment due dates (see example)
- Earlier fee payment deadlines facilitate cash flow and provide timelier information
- Online statement of account also used by staff in other offices
- Improved communication among student service offices (financial aid, registrar, student service center, etc.)
- Shared, cross-functional student information release (FERPA consent)
## 2013–2014 academic calendar and important dates

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<th>August 2013</th>
<th>September 2013</th>
<th>October 2013</th>
<th>November 2013</th>
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### Important Dates

- **Fees due, including first TOPP payment**
- **TOPP payment due**
- **Late fees apply after all payment due dates**
- **Dropped from courses for nonpayment**
- **Classes start (semester, session, or term)**
- **Break, no classes, offices open**
- **Final exams (reading day)**
- **Offices closed, no classes**
- **Commencement**

*Summer finals – Aug. 4-6. Commencement 2013 – Aug. 10*
On the horizon
Enhancements

- Upgrade to PeopleSoft 9.0 provides delegated access to parents/guardians
- Streamlining third party processing
  - PeopleSoft 9.0 improved functionality
  - NACUBO’s third party workgroup (best practices and standardization)
- Transforming reporting and metrics throughout OSU
  - Consistent with benchmarking effort in which NACUBO is our partner
Contact us

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