**Opportunity (Purpose or Primary Reason for Project):** The current bookstore charge process was designed in 2000 to process PELL awards in PeopleSoft and load them to the bookstore system in order to be accessed when students purchased textbooks. Since then, the College has attempted to accommodate students with eligible sources of aid from scholarships, loans, and 3rd party payers. This was never an intended function of the original PeopleSoft system.

The link between PeopleSoft and the bookstore system is not “real time,” so accounts must be populated with award amounts at irregular intervals via physical, flat file transfer. The time delay often causes the student to “bounce” from the Bookstore register, to the service desk, to the Financial Aid office, and back to the Bookstore until the issue is resolved. Students frequently encounter long lines at each area. In the end, a paper voucher is often prepared for the student which must be manually entered into the bookstore system for the charge to appear.

Furthermore, the process has cut-off dates which do not accommodate all aid-eligible students, especially those enrolled in flexible duration classes (e.g., 8-week, 12-week).

**Business Case (Budget Information):** The project would impact customer service to students and help with our strategic goal of making college more affordable.

This process enables transactions totaling $1,237,277 (Fall term 2008). 7,781 charges were loaded; 4,012 were in a zero-balance, “denied” status; and 1,107 were completed by paper voucher. Only 2,662 or about 34.2% actually work in the way the process was intended.

**Goal (Expected Outcomes, Deliverables, and/or Results):** PRIMARY: Improve student access to dollars available for textbooks/supplies purchases. Improve bookstore purchase transaction speeds. SECONDARY: Improve communication to students about timelines and what types of aid get loaded to their account.

**Scope (Constraints, Boundaries, and/or Key Risks):** The process begins when it is determined that a student will receive a type of aid that allows them to purchase textbooks. The main cycle is the approximately two-week period before and after classes start. The process ends when the charges are transferred to the Student Finance office and loaded to the Student Accounts.

The process experiences “pain” more acutely during the fall book-buying period than in the spring buying period.

**Timeline (Define, Measure, Analyze, Improve, and Control):** Complete project so that improvements could be tested in the fall book sale period in August 2009.
**Primary Measures:** Number of PELL accounts populated by automated process; number of accounts populated manually by voucher; number of accounts populated by system load. Count and dollar amount of charges coming from the bookstore (by agent #) that get loaded back into Student Finance system.

**Other (Additional Resources Needed, Critical Considerations, and/or Initial Concerns):** Consideration should be given to pending regulatory changes with respect to reporting bookstore activity.