



NYSOBBA

The New York State Organization of
Bursars and Business Administrators

BURSAR 101

Lynn Bowers, SUNY Fredonia
Jacob Kopera, Niagara University

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2025 NYSOBBA ANNUAL CONFERENCE

WHITE PLAINS, NY

AGENDA



What is a Bursar?

Responsibilities-Director Level

Managing Student Accounts

Financial Aid

Refunds

Payments

Payment Plans

Collections

Customer Service & Communication

Regulations

Resources

Questions

What is a Bursar?



Definition: Bursar – Medieval Latin Term “Bursa” or Purse

- Senior professional financial administrator at a school or university, usually dealing with student finances.
- Traditionally reporting up through Business Administration/Controller division but has also morphed into Enrollment Services models or ‘One Stops’ reporting to Academic Affairs.

Director/Manager of Student Accounts

Director of Student Financial Services

Director of Accounts Receivable

Manager of Financial Operations

Manager of Student Receivables

Assistant Controller/Business Manager

Primary Responsibilities



- **Policy and procedures**
- **Cash handling**
- **Disburse financial aid and refunding**
- **Internal Controls/Checks and Balances**
- **Segregation of duties**
- **Back-ups/Cross-Training**
- **Data integrity/security**
- **Process improvement/mapping**
- **Accounting and Reconciliation**
- **Accounts Receivable Management**
- **Personnel, Hiring & Evaluations**
- **Document Retention/Disaster Recovery**
- **Institutional financial reporting and analysis**
- **Regulatory Reporting**
 - **1098T, 1042S, 8300, TL11**
- **Billing and payment configuration**

State School Specific Functions



Working with Attorney General's Office on delinquent student accounts

Contact with SUNY Student Loan Servicing Center

State Residency Requirements

- Community College certifications of residency
- In state vs. out of state tuition rates

Managing the Student Account

Primary Record of Financial Transactions

- Tuition & fees
- Room/Board
- Other Institutional Charges
- Payments
- Adjustments

Electronic Records System

- Includes Platform for Processes
- Records & Registration
- Tuition/Fee Calculation
- Financial Aid Packaging
- Payment Processing
- Billing & Presentation

Student Account Systems & Invoicing



What Do We Bill?

Mandatory Charges:

- Tuition
- Fees

Optional/Institutional Charges:

- Housing/M Meal Plans
- Mandatory Student Health Insurance
- Parking/Tickets
- Books & Supplies
- Campus Card Accounts
- Other

Financial Aid 101



Financial Aid is constantly changing and updating each year. Stay current by reviewing these websites:

Information for Financial Aid Professionals:

- Federal Student Aid <https://fsapartners.ed.gov/home/>
- NASFAA nasfaa.org (askregs)
- NYSFAAA nysfaaa.org (great video resources)
- HESC <https://www.hesc.ny.gov>

Refunds 101



Financial Aid Credit Balances

Must be available within 14 days:

- From the time of disbursement or first day of classes (Whichever is later)
- Student Refunds vs. Parent PLUS loan refunds

By:

- Direct Deposit
- Paper Check
- Debit Card

Payments 101



Various Ways to Accept Payments

- In Person - Cash, Check, Credit/Debit cards
- Snail Mail, Lockbox - Checks
- Online - ACH(electronic check), Credit cards, debit cards
- Phone - Credit/Debit cards
- Payment options – payment plans

Not all institutions accept all types of credit cards and some no longer have a credit card machine in house due to expense and rigorous compliance policies.

Payments



Third Party Payments

Third parties are typically invoiced directly for the charges they have agreed to pay, but some third party entities may not require an invoice.

The liability for payment of tuition and fees ultimately lies with the student if a third party fails to pay all amounts as agreed.

Examples:

- Private Source Scholarships
- Vocational Rehabilitation –State and Federal
- Veteran's Benefits
- Pre-Paid/529 Plans
- Contract Courses

Collections 101



Managing Receivables

Not everyone will pay their bills in a timely manner:

- Financial Responsibility Agreement

- Consistent and Timely Billing; Make payment process as easy as possible

- Strong Customer Service

- Enrolled vs. Not Enrolled

- In-House vs Outsource

- Statute of limitations and litigation

- Financial Holds

Customer Service & Communication



Service Philosophy

Key Factors:

- School Culture, Current Administration, Partner Departments, Your team, Your experience and personal philosophy

Who is served:

- Students and families
- Other Campus Departments



Customer Service & Communication



Where Does Customer Service Fit

Customer Service is part of everything you do:

- Starts with account accuracy

- The tone is set upon admission

- Finances are a sensitive topic



Customer Service & Communication



Providing Service

Incoming Contacts:

- Department Email, Phone, Chat, Walk-ins

Inquiry Levels:

- Level One – basic
- Level Two – requires some special knowledge
- Level Three – very complex
- Hot Potatoes – usually angry

Training:

- On the Job Training, Reference Materials (including searchable procedures), Classes/Seminars

Customer Service & Communication



The Best Service is Proactive

Help Students and Families Help Themselves

Webpages

Communications

Early Intervention

Leverage Your Partners:

- Chancellors/President's Office
- Admissions/Financial Aid
- Community and High School Partnerships

Customer Service & Communication



Communication

Online Bill/Student Account Information

- Web Presence
- Social Media
- University/College Publications
- Proactive Emails/Text Messages to Target Populations

Refund Check Notification

Registration Cancellation Warning

Hold Notice

Bill Notification

Customer Service & Communication



Communication

Online Bill/Student Account Information:

- Bill Display
- Amount Due
- Display Transactions
- Financial Aid Pending
- Title IV Permissions
- Direct Deposit Set up
- 1098T electronic delivery
- Checklists
- Hold Information
- Authorized user/proxy payer
- Accept financial responsibility statement
- Payment Plan Enrollment

Working with Vendors

Solutions for web-based student platforms

- E-bills, web payments, payment plans, student refunds (direct deposit & campus card management)

Campus based loan servicers

- Perkins, Nursing, Institutional loans

Outside collection agencies to collect on delinquent AR and campus based student loans

Tuition Insurance

Student health insurance broker

- Managing student waiver process and billing reconciliations

International payment processors

Working With Other Campus Departments



Financial Aid

Admissions

Student Records/Registrar

Accounts Payable

Veteran Services

Residence Life

Academic Deans

President's Office/ Provost

Information Technology

Advice from Lynn & Jacob

- Leverage expertise of other higher education professionals and business partners
- Use NYSOBBA and other professional organizations as a resource
- ALWAYS test new processes
- Document annual processes in detail

Questions



Questions?

Thank you for attending!

Lynn Bowers, SUNY Fredonia
Student Information System: Banner
lynn.bowers@fredonia.edu

Jacob Kopera, Niagara University
Student Information System: Colleague
jkopera@niagara.edu