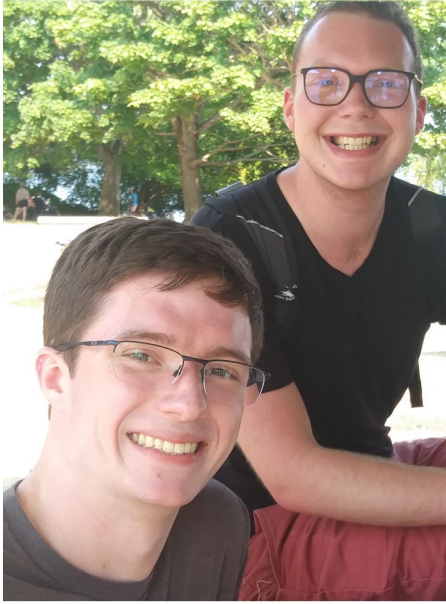


2018 Annual Report



Our Student Workers



“Working at SFS has shown me both the nuts and bolts of how the UW works, as well as skills to assist students in navigating through them.”

-Logan, Junior, English

“I have been at SFS for over two years, but working with and getting to know everyone has made the time go by so quickly.”

-Veronica, Junior,
Environmental Health



Student Fiscal Services employs **four UW undergraduates**

Our student workers get **real-world experience** doing valuable **customer service** and **accounting** functions and projects

Three of our **permanent staff** started their careers with Student Fiscal Services as **students**



“Working at SFS showed me how caring the staff are in wanting students to do well and make the right choices with their money and tuition, which makes SFS a very healthy and positive place to work.”

-Justin, Junior, Communications

“Working at SFS has really opened my eyes in seeing all the different ‘cogs’ that make up the University. Working here means a lot, as I’ve learned tons of new skills as well as met a great group of people.”

-Ethan, Junior, Business

Customer Service



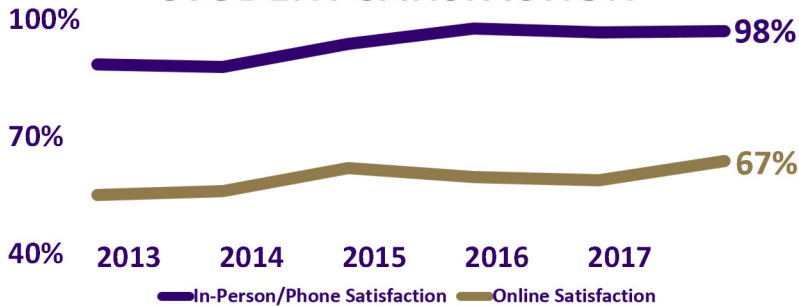
ORIENTATIONS
 SFS offered over **120**
Financial Literacy
 orientations,
 connecting with over
4,200 parents, and
 nearly **10,000**
 students!



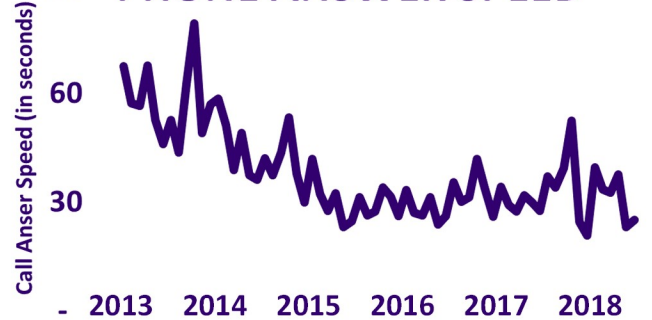
TAX REPORTING AND ADVISING

Issued **72,100** 1098T forms
 Answered **600+** Phone calls and **800+** emails
 Offered **10** tax classes
 A special **thanks** to the Tax Office!

STUDENT SATISFACTION



PHONE ANSWER SPEED



STUDENT SAFETY

To ensure the **safety** of our students, **cash payments** are now limited to **\$500**.
 Thank you to **UW Student Life, UW Tacoma, UW Bothell**, and **UW police** for **partnering** with us.

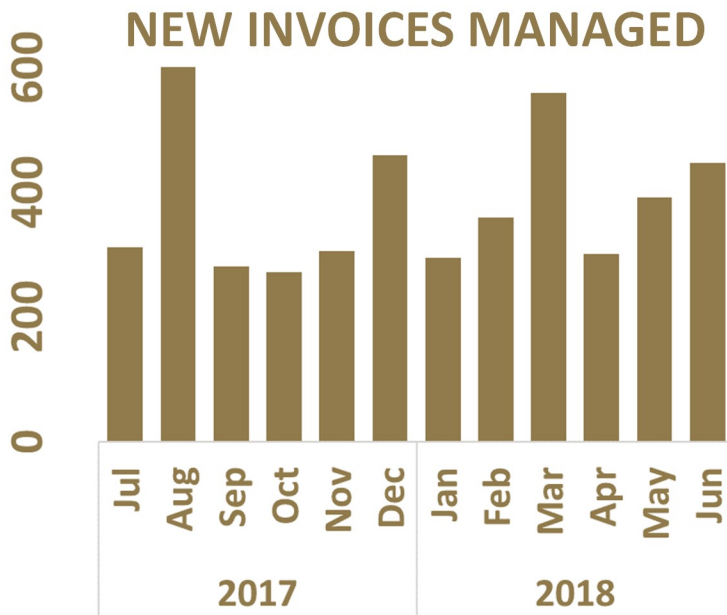
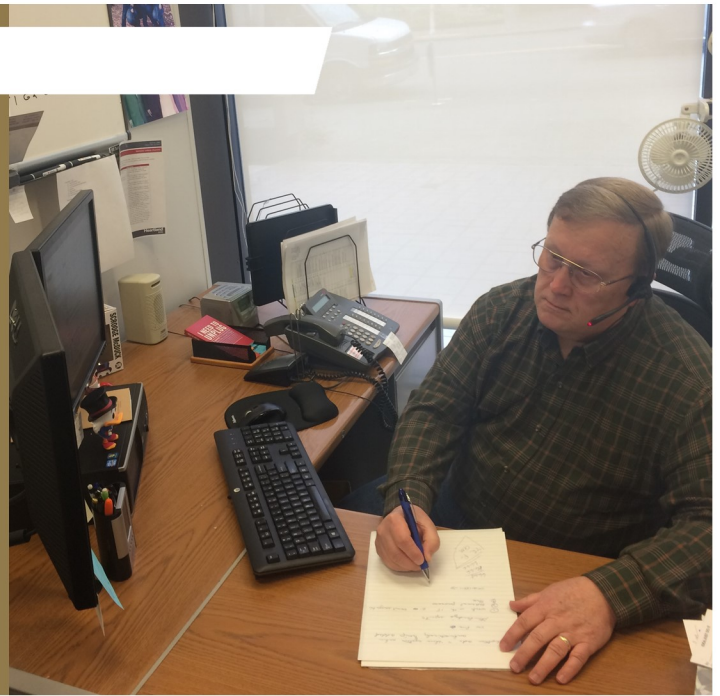


Receivables

STUDENT LOAN SUPPORT

The SFS Receivables team **supports** over **12,000** outstanding loans totaling **\$67 Million**.

We contact past-due **borrowers** at 90 days, **assisting** them in **resolving** past-due balances, and avoiding outside collections.



INVOICE RECEIVABLES

Invoice Receivables **supports** over **90 UW departments**, with in excess of **4,600 invoices** totaling over **\$10.3 million**.

Since January, 2017 we have added **16 new** departments to the group that we support through our **outreach**, and excellent **customer service** and support.



FINANCIAL AID PARTNERSHIP

Partnered with the **Office of Student Financial Aid** for a smooth transition to the new **Washington State Achievement Council** policies, ensuring a **minimal** negative **impact** on students.



Accounting

LOAN ACCOUNTING

Accounted for **\$67 million** in outstanding **institutional** and **federal loans**



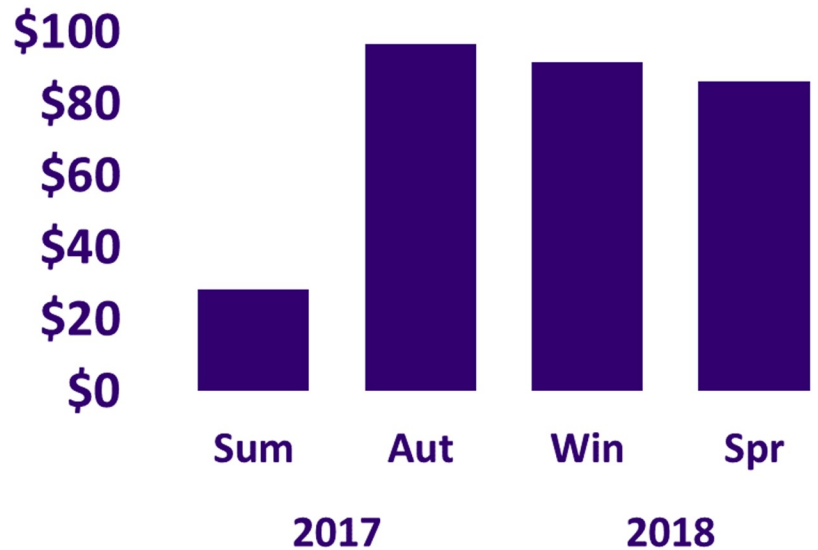
BANKING RECONCILIATION

Managed and reconciled multiple bank accounts with annual deposits of **\$98 million**

LOAN MANAGEMENT

Managed and reconciled **Direct Loans** with net disbursements over **\$290 million**

DIRECT LOAN DRAWDOWN (Millions)



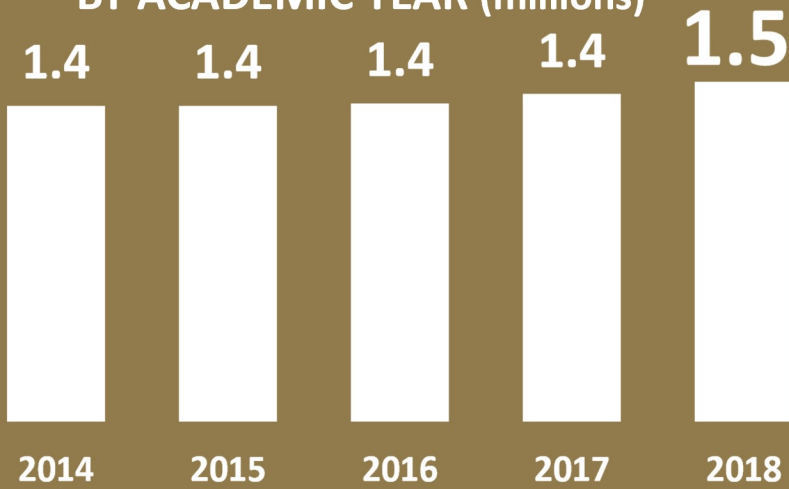
AUDIT RESPONSE

Responded **effectively** and **timely** to internal and external **auditors**

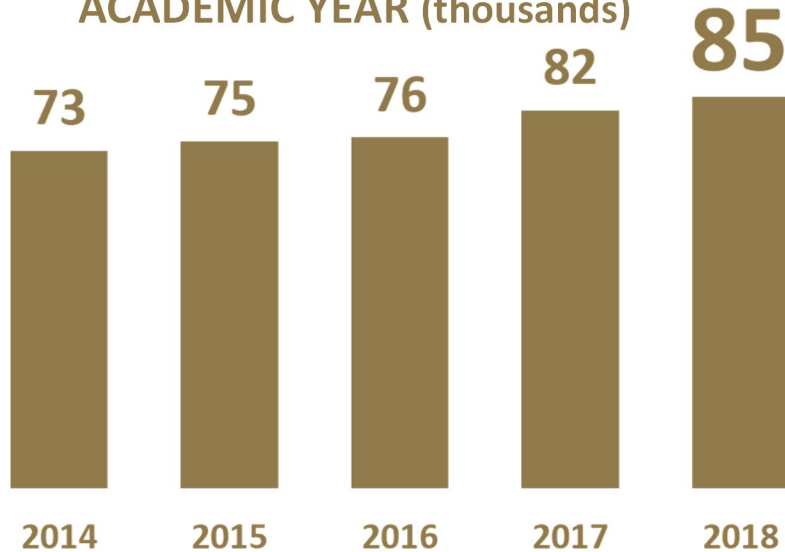


Computing

NUMBER OF STUDENT TRANSACTIONS
BY ACADEMIC YEAR (millions)



ACTIVE STUDENT ACCOUNTS BY
ACADEMIC YEAR (thousands)



NEW INITIATIVE

Collaboration with **Continuum College** and **UWIT** increased aid disbursed directly to tuition for fee-based students by **16%** year over year



STUDENT DATABASE (SDB)

Celebrated one full year without any high-impact **Student Database** errors.

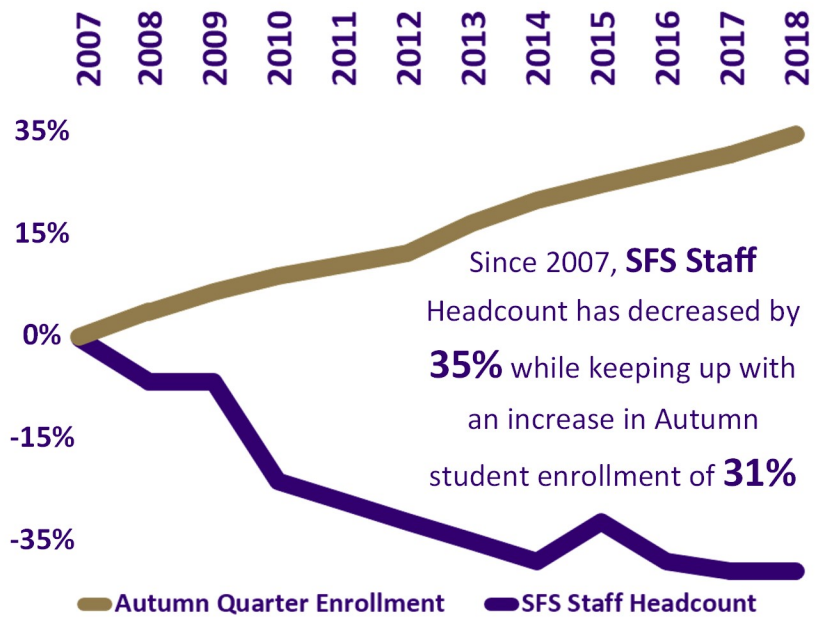


Process Improvement



LEAN

SFS is now in its **seventh** year of using the **LEAN system** of process improvement. Adapted from the **Toyota Production System**, LEAN focuses on **maximizing efficiency** and **eliminating waste** through **continuous** incremental **improvement**



PROCESS IMPROVEMENT THROUGH IDEA IMPLEMENTATION

During the 2017/2018 year, SFS employees Implemented 777 new ideas

Each SFS employee captured and implemented an average of 35 new ideas



About Student Fiscal Services

WHO WE ARE

STAFF

- 22 permanent staff
- 4 student workers

UNITS

- Customer Service
- Receivables
- Accounting
- Computing

WHO WE ARE

- Student billing
- Financial aid disbursement
- Loan and student account management
- Student tax reporting
- Collections
- Invoice receivables for UW departments
- Financial literacy outreach

CONTACT US

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Web: finance.uw.edu/sfs

