

Common Calendar Proposal

February, 2014

Indiana University does not share a common calendar across the seven campuses under IU administration. While in certain semesters start dates of most IU campuses are in alignment, a common calendar for beginning, census, refund, automatic withdrawal and term end dates would result in better service to students, create process efficiencies, and reduce errors.

The University's expansion of education opportunities between IU campuses will greatly benefit students regardless of their home campus. The current lack of a common calendar across campuses means different refund policies, financial aid disbursement rules, drop/add issues, and other processes, resulting in manual processing, confusion, and poor service to students. Manual financial aid processing can create federal compliance problems.

The Indiana University Academic Calendar Guidelines include the following:

- (1) In order that students may transfer from one to another campus of Indiana University without loss of time in the pursuit of their educational goals, the beginning and ending dates for semesters and major summer sessions will be approximately the same on all campuses to minimize overlap between two sessions at the various campuses.*

The proposed common calendar contains the following dates:

- Term Begin
- Census (Date of official record)-Sunday after the first week of classes
- Tuition and Fees Adjustment Calendars (Set by board policy)
- Auto Withdrawal Deadline (End of ninth week—being reviewed)
- Classes End-Includes Sunday. Final date classes end
- Exams End-Includes Sunday. Final date exams end
- Summer classes-to start the week following spring final exams

Please note sessions within the semester and fall and spring breaks are determined at the individual campus.

A committee will be formed by the UFC to establish common calendar dates while working with campus calendar committees.

Two additional documents are included:

- Straw-man common calendar proposal
- Detailed documentation on how a common calendar would benefit Indiana University

Proposed Draft Calendar for Discussion

Term begin date	Start of the semester
Census date	Official date of record for reporting: Sunday at 11:59 PM following the first week of classes (to include weekend classes)
Refund 100%	End of first week (as set by IU Board policy)
Refund 75%	End of second week (as set by IU Board policy)
Refund 50%	End of third week (as set by IU Board Policy)
Refund 25%	End of fourth week (as set by IU Board Policy)
End of Automatic Withdrawal ("W on transcript)	End of Ninth week of class (Sunday) Note: to be reviewed by Registrar Committee
Classes end	End of semester classes (includes last weekend)
Exams end	Exams competed one week after classes end (includes last weekend)
Summer class start date	Summer classes start the week following exams

FALL 2014	BL	EA	IN	KO	NW	SB	SE	Proposed
Term Begins	08/25/14	08/25/14	08/25/14	08/25/14	09/02/14	08/25/14	08/25/14	08/25/14
Census Date	08/30/14	08/30/14	09/01/14	08/29/14	09/06/14	08/30/14	08/30/14	08/31/14
End of first week (100% Refund)	08/30/14	08/30/14	09/01/14	08/29/14	09/06/14	08/30/14	08/30/14	08/31/14
End of 2nd week (75% refund)	09/06/14	09/06/14	09/08/14	09/05/14	09/13/14	09/06/14	09/06/14	09/07/14
End of Third week (50% refund)	09/13/14	09/13/14	09/15/14	09/12/14	09/20/14	09/13/14	09/13/14	09/14/14
End of Fourth week (25% refund)	09/20/14	09/20/14	09/22/14	09/19/14	09/27/14	09/20/14	09/20/14	09/21/14
End of Automatic withdrawal	10/22/14	10/24/14	10/17/14	10/17/14	11/07/14	11/01/14	10/31/14	10/26/14
Classes End	12/13/14	12/08/14	12/15/14	12/13/14	12/13/14	12/06/14	12/06/14	12/14/14
Exams End	12/19/14	12/15/14	12/21/14	12/19/14	12/20/14	12/13/14	12/13/14	12/21/14

Spring 2015	BL	EA	IN	KO	NW	SB	SE	Proposed
Term Begins	01/12/15	01/12/15	01/12/15	01/12/15	01/12/15	01/12/15	01/12/15	01/12/15
Census Date	01/17/15	01/17/15	01/19/15	01/16/15	01/17/15	01/17/15	01/17/15	01/18/15
End of first week (100% Refund)	01/17/15	01/17/15	01/19/15	01/16/15	01/17/15	01/17/15	01/17/15	01/18/15
End of 2nd week (75% refund)	01/24/15	01/24/15	01/26/15	01/23/15	01/24/15	01/24/15	01/24/15	01/25/15
End of Third week (50% refund)	01/31/15	01/31/15	02/02/15	01/30/15	01/31/15	01/31/15	01/31/15	02/01/15
End of Fourth week (25% refund)	02/07/15	02/07/15	02/09/15	02/06/15	02/07/15	02/07/15	02/07/15	02/08/15
End of Automatic withdrawal	03/15/15	03/13/15	03/15/15	03/06/15	03/27/15	03/21/15	03/20/15	03/15/15
Classes End	05/02/15	04/27/15	05/04/15	05/02/15	05/02/15	04/29/15	04/27/15	05/03/15
Exams End	05/08/15	05/04/15	05/10/15	05/09/15	05/09/15	05/07/15	05/05/15	05/10/15

Summer 2015	BL	EA	IN	KO	NW	SB	SE	Proposed
Term Begins	05/12/15	05/18/15	05/13/15	05/18/15	05/18/15	05/18/15	05/12/15	05/12/15
Classes/exams end	07/31/15	08/17/15	08/10/15	08/14/15	08/22/15	08/14/15	08/08/15	

Future Terms	Proposed Dates		
Fall	2015	2016	2017
Term Begins	08/24/15	08/22/16	08/21/17
Census Date	08/30/15	08/28/16	08/27/16
End of first week (100% Refund)	08/30/15	08/28/16	08/27/16
End of 2nd week (75% refund)	09/06/15	09/04/16	09/03/17
End of Third week (50% refund)	09/13/15	09/11/16	09/10/17
End of Fourth week (25% refund)	09/20/15	09/18/16	09/17/17
End of Automatic withdrawal	10/24/15	10/23/16	10/22/17
Classes End	12/13/15	12/11/16	12/10/17
Exams End	12/20/15	12/18/16	12/17/17
Spring	2016	2017	
Term Begins	01/11/16	01/09/17	
Census Date	01/17/16	01/15/17	
End of first week (100% Refund)	01/17/16	01/15/17	
End of 2nd week (75% refund)	01/24/16	01/22/17	
End of Third week (50% refund)	01/31/16	01/29/17	
End of Fourth week (25% refund)	02/07/16	02/15/17	
End of Automatic withdrawal	03/13/16	03/12/17	
Classes End	05/01/16	04/30/17	
Exams End	05/08/16	05/07/17	
Summer	2016	2017	
Term Begins	05/10/16	05/09/17	

Indiana University Shared Services Proposal for Common Calendar

Overview

The review of business processes under the Student Services Initiative Project determined that the university could provide better service to student and gain efficiencies and capture significant savings by implementing a common calendar. The benefits include reduced individual campus set-up and monitoring, less manual processing, streamlined data collection snapshots and report development, and the ability to better facilitate multi-campus students and faculty.

The University's expansion of online education opportunities will greatly benefit from a common calendar in order to offer online classes for students regardless of their home campus. Having different calendars results in different refund policies, financial aid disbursement rules, drop/add issues and other factors resulting in manual processing, confusion, and poor service to students, in addition to manual financial aid processing that can result in federal compliance issues.

Common Calendar Benefits

Business Processes

- Set up for batch scheduling (one schedule vs. seven)
- Standard application maintenance windows can be identified due to no overlapping campus business process providing greatly reduced disruptions to faculty, students and staff
- Set up for aid disbursement dates - regulatory restrictions for crediting federal aid no earlier than 10 days before 1st day of classes for a term
- The financial aid packaging schedule
- Academic Progress Evaluations
- Monitoring Pell Eligibility and enabling more automated processing
- Identifying students who received aid and withdrew before the start of classes
- State aid award adjustments after "week 4"
- Cancelling undisbursed loans at various parts of the year in accordance with federal requirements
- Managing loan start and end date changes to support the new 150% limit for federal loan subsidy
- Parent and Grad PLUS Loan setup and online application availability
- Award adjustment based on FLAGS advising and enrollment monitoring data

Registration/Registrars

- Dates could be established once per term and values populated for all campuses as part of a shared service; campus role would change to 'reviewer'.
- Publication of term and processing dates is simplified and less error prone.
- SIS control table values could be entered more efficiently, while reducing potential rework that results from inaccurate dates.
- National Student Clearinghouse reporting would be facilitated.
- The timing of enrollment and degree verification transmissions could be streamlined.
- Our SSCR (Student Status Confirmation Reports) for federal loan reporting could be standardized across campuses.
- The eDrop /eAdd processes could be more fully deployed and supported, offering students more online processing options.
- Extending online classes to all IU students with matching term and session dates would support the expansion of online education.

Student Billing/Bursar

- Consistent treatment of required SIS functions that dictate bursar processing; greater efficiency gained for Shared Service Initiative
- Term Default Date
- Tuition Calculation controls, assessment
- Billing – student and third party sponsors
- Refund periods – standardization for equitable implementation to all students, critical for student understanding of financial implications of drop/add during the term
- Elimination of the impact of disparate percentage refund dates
- Improved customer service – more succinct contacts in which staff is able to clearly explain dates, actual assessment, refund and financial aid policies
- Ability to process assessment, billing, collection, refunding, and aid disbursement in consistent manner
- Less time spent explaining to students, parents, and other the charges on accounts and how tuition is calculated as a result of drop/add/withdrawal activities
- Less time needed to train staff to decipher the tuition ultimately assessed given drop/add activity, refund periods
- Less time spent on fee appeals based on perceived University error, lack of understanding of online education complexities (For example, the Bloomington Office of the Bursar processed 702 appeals for tuition during the previous fiscal year; over 5600 administrative waivers were processed for drop/add activity 'protection' from the fee change related to the flat fee. Appeals/admin waivers all require manual review and intervention. Similar levels of activity exist on all campuses.)

Financial Aid

- The common calendar benefits for financial aid administration are numerous, but difficult to quantify. As back-offices processes are transitioned to USSS over the next year, a common calendar would improve our efficiency, and significantly reduce the risk of human errors and enable more batch processing for multiple campuses simultaneously.
- In FA it is common to be working in multiple processing cycles. In March, for example, we are running processes for the upcoming aid year (awarding new freshmen) at the same time we are running the same processes for the current aid year and the upcoming summer. Multiplying the concurrent process by 8 calendars adds to the complexity, and Financial Aid has a lot of deadlines and cutoff dates related to the periods of enrollment. By mid-summer, we are also configuring the SIS in preparation for admissions and scholarship selection for the aid year that begins over a year from now.
- The Term start/end dates along with various term dates are maintained by the Registrar Office, and financial aid processes rely on the accuracy of that data. When campuses have not finalized their start/end dates and/or make a date change after we have completed set up, a great deal of work is needed to manage the fallout. A stable and consistent calendar would significantly reduce stress and required re-work.
- One major benefit would be in our ability to cut the amount of time spent on campus-specific configurations related to setting up annual or term business process by roughly 2/3, by entering once and using the copy functions in the SIS. The current set up is very tedious and complicated. The cost of errors in set up is high. It would be safe to enter once, know it is right, and replicate.

JK
08/20/13 v1
02/14/14 v2