Congratulations to Ann Roberts of the Financial Services and University Bursar Office for receiving the first quarter Business Affairs Celebrating Excellence Award.

Ann creates positive change: With the recent Tuition and Fee Proposal, the Associate Vice President for Financial Affairs needed average course fees data to calculate an equitable differential tuition for two colleges, and no such report was available. Ann requested a new report with new parameters, then creatively massaged those reports to calculate average course fees for several scenarios on short notice. This allowed Financial Affairs to estimate the differential amounts needed in each college.

She partnered and delivered excellence service when the College of Sciences wanted to split existing course fees for a newly created department, she devised a change in Banner to facilitate the new cost center. She then took the time to discuss it with the department administrator until she understood the issue and how it would be corrected. Ann ensured there was an audit trail for the process (as opposed to manual transfers), and communication with the affected department. Ann is truly an expert in her field. She came up with a process to assess a program fee for new online Cyber Security students rather than the traditional mandatory tuition and fees. She set up fee tables for the Guaranteed Tuition Plan that UTSA is required to offer … a truly complicated process.

Ann is concerned with doing the right thing for our students and pays attention to what is fair for the student while also adhering to regulations/policies. Her interactions are primarily with faculty and staff, but since she updates student residency for a variety of waiver programs, students are sometimes referred directly to her. Ann respects and shows compassion for students. She cheerfully explains the process to students and helps them understand why they may or may not receive the waiver/exemption for which they believe they are eligible.

Ann values and empowers staff. Beyond providing them with a report, she takes the time to explain how financial information is fed from Banner to PeopleSoft. When she takes the time to explain our processes, knowledge is passed on to faculty and staff. They then learn how, and are empowered, to obtain the data on their own. They also become more familiar with the overall revenue process.
Ann lives by the Business Affairs Guiding Principle of “Do the Right Thing.” This past year, after the initial August refund disbursement run, she discovered a problem with our Pell awards to our fall-term students, but no issue had yet been reported to Financial Services. Her proactive reporting allowed Financial Affairs to identify the issue and start the process of reversals and re-issues that same day. The errors affected more than 1,300 students and total refunds of over $3 million. This critical fast action saved UTSA from negative publicity and customer dissatisfaction.

This is just one example of Ann finding processing errors before they become an issue for the student or UTSA. In the past, she has also discovered students who were registered after Census without payment, students who were registered just before a de-registration, and other issues that would have become customer service issues had they not been detected early.

Ann exemplifies the Business Affairs Guiding Principles of Create-Partner-Respect-Value-Do the Right Thing in her daily interactions with faculty, staff and students. Her commitment to our Guiding Principles ensures that she takes a proactive approach when she comes across processing errors. A well deserved Celebrating Excellence Award!