



**RUTGERS**  
**IOWA STATE UNIVERSITY**

**Exchange Enrollment Management-Tracking**

# OVERVIEW

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## Who are We and Who do We Serve?

- Center for Global Education, is now called Rutgers Global-Study Abroad.
- We serve
  - Incoming Semester and Academic Year students.
  - Rutgers Students going abroad for Semester, Academic year, Short term and Embedded programs.

## The Numbers

- Rutgers sends an average of 120 students on an exchange program each Academic year:

about 5 per Academic Year

about 50 per Fall Semester

about 65 per Spring Semester

- Regional Data:

58.95% to Europe

21.08% to Asia

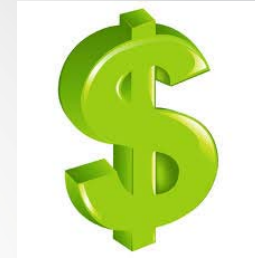
17.04% to Oceania

1.929% to Latin America

.643% to Sub-Saharan Africa

.429% to North Africa and Middle East

## The Issues of Exchange Enrollment Management at Rutgers University



- A little accounting backstory...
  - Rutgers students going abroad are billed at Rutgers Tuition, admin fees and insurance.
  - Incoming Exchange Students are also billed at Rutgers Tuition and fees.

This process creates student data management issues  
and accounting process issues.

## Accounting Issues

- ISSUE #1
  - RU student pays at one amount. Rutgers Global-Study Abroad office pays off at a disproportionate amount if the exchange is not in the same Academic year.
  
  - Example: Outgoing Australia Student Fall 2016 and Incoming Exchange Student Fall 2017...

## Accounting Issues

- ISSUE #2

- Year-End Reconciliations.

- Deficits

- Accounts should be zero at year end.

- Charge deficit balance to another account with profit.

- Surpluses

- Potential return back to Central Accounting of “surpluses”.

## Accounting Issues

- ISSUE #3
  - Manual Process.
  - Can create big losses.
  - Can affect balance negotiations.

## Solutions/Work-Around, Accounting Specific

- Solution #1
  - Identify key partners within Rutgers to manage balances. I.E. Registrar's office, Student Accounting or Academic departments.
- Solution #2
  - Roll Up Balances all into one account each Academic Year.
- Solution #3
  - Inflate outgoing exchange program to the average amount of tuition increase.



## Solutions/Work-Around, Accounting Specific

- Solution #4

- The ultimate solution is not be charged at all for incoming student exchange.

- Solution #5

- Utilize Terra Dotta for a more efficient tracking record.

## Terra Dotta Specific Issues:

- Terra Dotta doesn't "speak" to any systems.
  - Example-Deposits
  - Example-Program Prices
  
- Exchange balances aren't exportable for efficient reconciliation.

## Solutions/Work-Around, Terra Dotta Specific

- Solution #1
  - Assign an applicant parameter to each student, with Program fee.
  
- Solution #2
  - Create “tag” based reporting to run.

## It's not all bad...

- What we have going for us at Rutgers:
  - Everything is new..
  - Many thriving agreements in good locations.
  - Great team of advisors and staff who are stakeholders in the exchange balance process.

# IOWA STATE UNIVERSITY

Study Abroad Center



# Institution Background

- Study Abroad Decentralized Model
  - Each college has their own study abroad office to a greater or lesser extent
    - Different colleges have different study abroad program models
    - College of Engineering heavily focused on exchanges, but others have their own exchanges
  - Study Abroad Center operates university wide programs, including exchanges
    - Has no authority over the college offices per se

# Exchange Overview

- Exchange
  - acad = 5
  - fall = 49
  - spring = 68
  - summer = 19
  - TOTAL 141 (including summer)
- Geographic regions
  - Europe = 93 = 65.96%
  - Asia = 23 = 16.31%
  - Oceania = 25 = 17.73%
  - Central and South America = 0
  - Africa = 0
  - Middle East = 0

# Accounting Background

- Outgoing students are charged tuition, fees, and insurance
  - Enrolled in placeholder class specific to their exchange program
  - Charged tuition and fees automatically based on placeholder class using specific billing codes, which determine account to deposit \$\$\$; SAC bills insurance
- Incoming students are charged tuition and fees
  - Receive a waiver equal to normal tuition and fees. The waiver money comes from outgoing fees
  - Responsible for any extraneous fees (e.g., special course fees, delivery fees, student records fees)
  - Registrar's office uses TDS to get list of incoming exchange students and update the legacy fee assessment system with the code that determines assessment and which billing codes are using for billing student accounts



# Successes / Challenges

- Challenges
  - Decentralized study abroad model
  - Dramatic increases in exchange students
  
- Successes
  - University wide exchange committee
    - Has mitigated communication issues
    - Allow to delegate management of incoming exchange students to colleges

# Terra Dotta Software

- Successes

- Improved exchange balance tracking overall
  - Decentralized model allows colleges to opt out
- Streamlined access to data
  - e.g., Registrar has access to the TDS to get needed info

- Challenges

- If the program managers deactivate the program, it wipes out the balance that was created for that program, including any historical data imported. It is important to keep a back-up copy.
- Exchange balances specific to colleges:
  - Not designed to keep separate balances, for the same institution. If you have a balance to keep for KTH Engineering, and one for KTH Design, you'd need 2 brochure pages to keep separate balances, then you'd need the same for incoming, as well.

# Comparison

## Rutgers

- Successes
  - Centralized model, less political issues
  - New accounting system
  - Change to RCM model
- Challenges
  - Cumbersome manual accounting system
  - New accounting system
  - Change to RCM model

## Iowa State University

- Successes
  - Good automated accounting system
  - TDS mostly helpful
- Challenges
  - Decentralized study abroad model
  - TDS software limitations

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That's a lot to digest. Any questions or comments?

STUDY  
ABROAD

Also, what are your processes and challenges?

