

**A Textbook Connection to Better Student Service
Combining & Utilizing Campus Resources Productively**

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*During the mid 1990s, the University of Florida faced two major issues concerning textbooks and course materials. First, our students wanted to defer their purchases of these items until their financial aid was disbursed. This eventually led to the creation of the **Textbook Deferred Payment Program**. Second, we needed an efficient method of providing textbook adoptions and course materials information to an ever-increasing number of online vendors and a large contingent of local bricks-and-mortar bookstores. The **Textbook & Course Materials Requirements Program** was developed to solve this demand. Through a cooperative effort between the Business Services Division, University Registrar's Office, Student Financial Affairs, and University Financial Services, these two programs were developed to meet these demands, thereby resulting in improved services to our students, faculty, staff and visitors.*

The University of Florida

UF President – Charles E. Young

Vice President for Finance & Administration – John “Ed” Poppell

The University of Florida is a major, public, comprehensive, land-grant, research university. The state's oldest, largest and most comprehensive university, Florida is among the nation's most academically diverse public universities. Florida has a long history of established programs in international education, research and service. As of year 2001, it is one of only 17 public, land-grant universities that belong to the Association of American Universities.

In 1853, the state-funded East Florida Seminary took over the Kingsbury Academy in Ocala. The seminary moved to Gainesville in the 1860s and later was consolidated with the state's land-grant Florida Agricultural College, then in Lake City. In 1905, by legislative action, the college became a university and was moved to Gainesville. Classes first met with 102 students on the present site on September 26, 1906. The University of Florida officially opened its doors to women in 1947. As of year 2002, with more than 46,000 students, Florida is one of the fifth largest universities in the nation.

In 1985, Florida became a member of the Association of American Universities, the prestigious higher-education organization comprised of the top 63 public and private institutions in North America. Florida offers more programs on a single campus than all but a few U.S. universities. A land-grant university with a distinguished record of developing Florida agriculture through research and extension services, Florida is among

the nation's leading research universities as categorized by the Carnegie Commission on Higher Education. Florida has 21 colleges and schools and more than 100 research, service and education centers, bureaus and institutes. More than 100 undergraduate majors are offered. Nearly 2,000 freshmen and sophomores participate in the honors program, which offers 90-100 honors courses per semester. Most classes are limited to no more than 25 students. The Graduate School coordinates almost 200 graduate programs. Professional degree programs include dentistry, law, medicine, pharmacy and veterinary medicine. There are approximately 11,500 faculty and staff members.

Initiative

During the mid 1990s, the University of Florida faced two major issues concerning textbooks and course materials. The first issue was one affecting our students on financial aid. An overwhelming majority of our students were, and still are, on some form of financial aid, which includes scholarships, grants and loans. Since most of these funds are disbursed after classes have begun, our students wanted to defer their purchases of these items until their financial aid was received.

The second issue involved providing an efficient and timely method of supplying textbook adoptions and course materials information to an ever-increasing number of online vendors and a large contingent of local bricks-and-mortar bookstores. Since this information, either acquired by or provided to the institutionally operated store, is considered public information, an online web based approach seemed to be the best

solution. Not only would we provide the information online, it would be submitted in the same manner by faculty or department staff.

Through a cooperative effort between the Business Services Division, Student Financial Affairs, University Financial Services and the University Registrar's Office, two programs were developed to meet these demands, resulting in improved services to our students, faculty, staff and visitors.

Design & Implementation

The Textbook Deferred Payment (TDP) Program for textbooks and course materials normally begins 2 weeks before classes start and extends through the first week of classes. Prior to fall semester, the beginning date may precede the first day of classes by 3 weeks or more, depending on the availability of financial aid information. The length of the period is limited based on our expectations of financial aid being released. Only a small percentage is released within the first 5 days of classes. Beginning and/or ending dates may vary for multiple store locations depending on the academic calendar of the colleges served. This schedule dictates many other aspects of the program including posting information on the web, sending out emails to students and the creation of student accounts at all stores.

Through file transfer protocol (FTP), our Student Financial Affairs office provides the student's name, university ID number and sum total of all aid that will be disbursed through the university. This does require a set of exclusions to be in place to avoid having

aid included that may be disbursed in an untimely manner or has other requirements attached that would interfere with normal disbursement. After deducting an estimated cost of tuition, an amount of credit is established from which the student can purchase textbooks and course materials. A maximum credit limit is set based on the student's college and classification. Students in professional colleges such as dentistry, law, medicine, pharmacy, etc. are allowed higher credits due to the cost of texts associated with their classes. These majors obviously require a higher level of financial aid awards to be eligible for the program. Under the guidelines we have established, approximately 70% of our approximately 47,000 students are eligible for this program.

Once these accounts have been sorted for the respective branch stores, they are then transferred to the Accounting Department of our UF Bookstores. This department coordinates the building of the accounts at each store location as needed. This process continues throughout the deferment period as new accounts are added and additional financial aid awards are posted.

Students are informed of this program through a variety of means. All UF students are required to have UF email (Gatorlink) accounts for important university-related communications. Messages are sent out to students notifying them of their eligibility for the program once the accounts are built in the bookstore's POS and accounts receivables systems. Incoming students are provided information about the deferment program during Preview (new student) orientation sessions that also include presentations on our other services (e.g., meal plans, parking decals, ID Cards, vending accounts).

An online method of providing information to students is through the Integrated Student Information System (**ISIS**). This system provides students with personal information related specifically to class schedules, grades, and financial accounts (i.e., tuition, library fees, and financial aid). In addition, textbook and course materials requirements matched to their class schedules may be viewed. On this page, students will also see their TDP account once established. The credit amount and other information needed to proceed with the purchase are listed. This application is connected to the Textbook & Course Materials Requirements Program which will be discussed later.

The Textbook Deferred Payment Program provides several benefits:

- ✓ Students may shop early for lower-priced used textbooks.
- ✓ Students are more likely to have the books and materials they need to prepare for the beginning of classes.
- ✓ More funds are available to students to purchase other needed items such as school supplies, housing accessories, food services, etc.
- ✓ By building these accounts in advance and downloading to the POS systems, students simply use their UF ID (Gator 1) card in the same manner as a credit card. We call ours the “Gator 1 Deferment”.
- ✓ No extensive paperwork or cumbersome handling of documents is required. The charges are exported to University Financial Services where they reside on the respective student account until the award(s) are disbursed.

- ✓ On the bookstore side, there is considerably less cash and check handling required as well as a substantial savings on credit card fees and bad debt write off.
Collection problems resulted for only .3% (\$10,000) of the total sales of \$3,740,000 for FY 2001/2002.
- ✓ Pre-term opening sales increase significantly thereby reducing the impact on the bookstore during the first week of classes.
- ✓ Our Student Financial Aid office receives much fewer emergency loan requests that are normally associated with financial aid awards.

The online web based Textbook & Course Materials Requirements Program was developed to provide a convenient method for faculty and staff to communicate textbook and course materials requirements information to students, vendors and all interested parties. This program is similar to ones some schools may have through agreements with Barnes and Nobles, Follett, Missouri Book Services, Nebraska and other such textbook vendors. The difference may be that this system is independent of the on-campus bookstore operations. It is considered an extension of the University Registrar's office and is associated with the student's class schedule through ISIS. Not only do students see these requirements immediately after registration, but they may also search the database before book buyback periods begin to determine the possibilities of their books being re-used again, thereby potentially bringing higher values.

The University Registrar's Office provides the course data for this program.

Faculty and staff entering textbook and course materials information provide their email addresses during the sign-on procedure. This allows for instant follow-up by bookstore staff in the event some information needs clarification or new editions are pending. It also enables vendors to notify the faculty and staff who entered the information that the books and/or materials are being ordered. All local bookstores and web-based textbook vendors have access to the information. The only requirement is to register to use the program. The information is available to the general public through the Business Services Division web site by course term, course prefix and number. It is truly public information provided in a very concise and convenient manner.

The benefits of the Textbook & Course Materials Requirements Program are:

- ✓ Students may view these requirements at registration and immediately afterwards provided submission deadlines are met by faculty.

- ✓ Students may search the database before book buyback to determine the possibilities of their books being re-used thereby providing higher buyback value.

- ✓ By matching the information to each student's schedule, it may be viewed and printed thereby providing a shopping list.

- ✓ Faculty and staff entering textbook and course materials information provide their email addresses which allows for instant follow-up by bookstore staff in the event information needs clarification or new editions are available.

- ✓ All local bookstores, web-based textbook vendors, students and the general public have access to the information. It is truly public information provided in a very concise and convenient manner.

The ultimate key to success for these programs is the participation of the entire faculty in the Textbook & Course Materials Requirements Program. By providing this information in a timely, organized and openly public manner, all students and faculty will benefit. With only approximately 75% participation by course instructors at UF, the Textbook Deferred Payment Program still accounts for approximately \$3,750,000 or 53% of the back to school related merchandise sales during the deferment purchase period or 25% of the total annual sales.

Implementation and Maintenance Costs

It is very difficult to determine the costs of these programs due to the time line in which they were developed. Both programs were begun in 1997 and have been constantly maintained and improved over that time frame. The Textbook & Course Materials Requirements Program has been the most costly due to its functions. An initial developmental cost estimate is approximately \$30,000. Business Services Division funded the project and has assumed all costs associated with maintenance and improvements since its inception. There have been no significant costs for the other partners since their primary functions have been to supply access to data. Annual maintenance and enhancement costs are estimated at \$40,000.

Offsetting these costs are the increased sales at the Bookstore which generate substantial commissions. Students are also able to spend more on supplies and other merchandise due to having more money available. Earlier sales have also reduced the labor required during the rush periods by distributing the activity over a longer and less demanding time frame. Credit card fees, cash and check handling, and collection problems have all been reduced. Requests for emergency loans have decreased thereby saving labor associated with processing these loan applications on campus. And one benefit that cannot be measured is that of helping students and parents cope with the rising costs of higher education in any way that we can.

On-line Program Information

Both programs have web links on the BSD home page: <http://www.bsd.ufl.edu/>. For the Textbook Deferred Payment Program, Frequently Asked Questions (FAQ's) and General Information is available. The Textbook & Course Materials Requirements Program has both a link to its home page and a link for Course Textbook Requirements for Students that can be used by anyone. These are listed under "Other Business Services & Web Links".

Supplemental Documents

- A. Textbook Deferred Payment Program Process – pgs. 13-14.
- B. Textbook & Course Materials Requirements Program Process – pgs. 15-16.
- C. Textbook & Course Materials Requirements Program Home Page – pg. 17.

Textbook Deferred Payment Program

Summary of Events, Roles, Functions, and Information Flow

Business Services:

- Determine schedule for text deferment program.
- Define business rules to set deferment amounts as a function of financial aid, class, college, and other parameters.
- Get branch operating schedule from UF Bookstores.
- Create deferment accounts – several times weekly during deferment season.
- Process award data and produce account load data sets using NERDC process.
 - *FallDefer, SpringDefer, SummerDefer*
- Email account data sets to UF Bookstores.
- UF Bookstore loads new accounts into JDA/POS system.
- Create text for book deferment bulk Email to be sent by NERDC – for each new account set.
- Create identity data set of UF ID's for students to receive bulk Emails – repeat as needed.
- Create data set for publication of deferment information on BSD Web and link to ISIS system.
- Load BSD Web data set – repeat as needed.

Students:

- Receive bulk Email regarding book deferment.
- Students review class schedule and book deferment credit amount within ISIS – linking to BSD pages.
- Students purchase texts at UF Bookstores using available deferment credit.
- Charges are extracted from financial aid awards as they come in and before disburse of proceeds to student via direct deposit or check.

UF Bookstores:

- Record deferment purchases at POS.
- Enter some deferment accounts manually as needed.
- Extract deferment charges from POS system.
- Send charges to BSD via FTP.

Business Services:

- Receive raw charge data from UF Bookstores.
- Review for errors and data problems.

- Prepare deferment charges for submission to campus A/R – several times weekly during deferment season.
- Allocate new charge data sets at NERDC.

- FTP raw charge data to NERDC.
- NERDC processes to create A/R submission for charges and create credits.
 - *ChargeFall, ChargeSpring, ChargeSummer*
- Forward credit data sets to BSD accounting for manual posting to A/R.

- Prepare periodic report of charges submitted to A/R, payments applied, and charges outstanding.
 - NERDC processes:
 - *A/Rextract*
 - *A/RHTML*

- A/R reversals: Submit charge adjustments to reverse remaining deferment charges in A/R just prior to student account collection.

Textbook & Course Materials Requirements Program Summary of Events, Roles, Functions, and Information Flow

Business Services:

- Determine text adoption schedule for term and when course schedule “goes to print”.
- Prepare Text adoption site to accept adoptions for new term.
- Begin extraction of section data from Registrar files (Approx daily during adoption season).
- Coordinate with Registrar regarding readiness of section data.
- Extract from backup tape using NERDC process.
 - *GetFall, GetSpring, GetSummer*
 - *GetFallPrelim, GetSpringPrelim, GetSummerPrelim* (as needed).
- Prepare section data for load into Text Adoption Database using NERDC process.
 - *MakeFall, MakeSpring, MakeSummer.*
- FTP to BSD file server.
- Load into Text Adoption database each morning.
- Supply new Department information as needed using NERDC process.
 - *GetDept.*
- Supply section and enrollment data on request to UF Bookstore using NERDC process.
 - *FallEnroll, SpringEnroll, SummerEnroll.*

Faculty and Staff Users :

Web page functions available to users:

- Register to use the text adoption application.
- Update contact information.
- Submit an adoption.
- Edit an adoption.
- Cancel an adoption.
- View & print adoptions for a course.
- View and print a summary of adoptions for departments.
- View & print participation data for colleges, departments and instructors.

Vendors:

Web page functions available to users:

- Request access to adoptions.
- View & print adoptions.
- View & print edited adoptions.

- Act upon adoptions by ordering and stocking titles.
- Contact adopters by email.

Students :

- View adoptions (text requirements) by class section:
- Via ISIS with class schedule and eligible text deferment credit amount.
- Via BSD web site home page for specific courses and sections.

Community:

- View adoption compliance reports:
- Via web site by college, department and course.

- View adoption information by class section:
- Via BSD web site home page.

Business Services Text Adoption Administrator:

Web page functions available:

- Review (approve) text adoptions.
- View adoptions beginning with an adoption ID.
- Lookup adoptions by section number.
- Approve vendors.
- Verify student view of textbook requirements.
- List of text adopter information.
- View archives of text adoption participation data – by term and date.
- View overall UF or a college’s adoption history – by term.
- Link to adoption reports by college.

Other administrator activities:

- Maintain contact with adopters to encourage adoptions.
- Handle text adoption user phone support.
- Identify departments/colleges with low compliance.
- Meet with adoptions user groups.
- Prepare text for adoption announcements.
 - UF “E News”.
 - Memo from UF Registrar.



FACULTY & STAFF

INSTRUCTIONS / *Forgot your Textbook Adoption password?* [Click here.](#)

[PRESIDENT'S MEMO](#) | [PROVOST'S MEMO](#) | [OFFICE OF THE REGISTRAR MEMO](#) | [PROGRAM BENEFITS \(Updated 3 Oct 2002\)](#)
[Register to Use the Textbook Adoption Application](#) | [Update Your Contact Information](#) | [Submit an Adoption](#) | [Edit an Adoption](#) | [Cancel an Adoption](#) | [View Adoptions for a Course](#) | [View a Summary of the Adoptions for Your Department\(s\)](#)

TEXTBOOK VENDOR

[Register to View Adoptions](#) | [View Adoptions](#)

UF COMMUNITY

[View Textbook Adoption Participation Data](#) | [What's New](#)

If you are a University of Florida student and have a question about book deferments, send an e-mail to deferments@ufmail.ufl.edu.



University of Florida faculty or staff or local textbook vendors may direct comments or questions about this on-line application to the textbook adoption manager at 392-0306 or send an e-mail to TextAdoptionWebHelp@ufmail.ufl.edu.



Faculty or staff with questions about physical book orders at the UF Bookstores may contact Carl Corliss at 392-0194 or e-mail Carl at ufbookstore@ufmail.ufl.edu.



If you are faculty or staff and forgot your Textbook Adoption password, [click here.](#)