

Residency Reclassification Wizard
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Abstract:

The Division of Student Affairs, Office of the Registrar and the Office of General Counsel at the University of South Florida, developed and implemented a secure interactive website to communicate the requirements for obtaining Florida residency for tuition purposes and to assist continuing students with determining their eligibility for in-state status. Implementation included developing a student centric approach to communicating residency requirements and providing a means of self-assessment while reducing workload on Registrar's Office staff.

This proposal discusses the development life cycle of the web-based Residency Wizard and the process followed to ensure the application met the needs to the University, of the students, incorporated a comprehensive set of business rules and provided maximum accessibility and usability on a secure platform.

Executive Sponsor:

Dr. Harold Nixon, Vice President, Student Affairs

Other Sponsors:

Ms. Angela DeBose, University Registrar

Ms. Joanne Adamchak, Assistant General Counsel, Office of General Counsel

Implementation Team:

Mr. Christopher Cobb, Associate Registrar

Ms. Eva Christensen, Assistant Registrar

Mr. Jason Lehman, Web Development

Mr. Eric Andersson, Residency Counselor

Introduction

Founded in 1956 the University of South Florida has developed into one of the nation's major public research universities. In 2000 the Carnegie Foundation of the Advancement of Teaching elevated USF to the top category in its systems of classifying institutions: Doctoral/Research Extensive. Furthermore USF is ranked among the top 100 public research institutions. The University's most recent re-accreditation by the Southern Association of Colleges and Schools occurred in December 1994. The University anticipates reaffirmation by SACS in December 2005.

Garnering more than \$254 million annually in external funding to support research and development projects, USF is uniquely positioned to support the rapid growth and development in the state of Florida. The Tampa Bay region is among the nation's most dynamic and rapidly growing areas, helping make Florida a cosmopolitan, urban state.

With enrollment over 41,000 students in 2004, the University offers 84 bachelor's degrees, 86 masters degrees, 34 doctoral degrees and the doctor of medicine degree. USF awards more than 4,650 bachelor's degrees and 1,700 masters degrees on campuses located in Tampa, St. Petersburg, Sarasota and Lakeland, Florida. In its short history, USF has awarded more than 180,000 degrees. Students hail from all 50 states and 116 countries -- over one quarter of the student population is African American, Hispanic, Asian American, Native American or of another nationality than American. (Excerpts from Strategic Plan 2002-2007.)

A Division I program, USF intercollegiate athletics are an integral part of the University's mission. Evolving from a basketball program in its infancy to an 18-sport varsity enterprise and perennial conference contender, USF Athletics provides a mechanism by which the community can identify with the University and leads supporters to a greater awareness of the University's mission, academic programs and prominence as an educational institution.

Statement of the Problem/Initiative:

At the University of South Florida, students admitted as a Non-Florida residents, may request reclassification to that of a Florida resident for any subsequent term. Students seeking reclassification must conclusively demonstrate they are in the state to establish a permanent home and their presence is not merely incident to their enrollment at the University of South Florida. Furthermore, students under the age of 24 are considered dependent and thus a resident of the same state as their parents. These students have the added burden of proving they are financially independent. If a student meets the criteria for in-state status, he is assessed at the in-state rate for the remainder of the time he is an active, enrolled student. (Reference from Florida Division of Colleges and Universities Residency Manual)

As enrollment increases at the University of South Florida, the number of out-of-state students grows proportionally. Furthermore, the cost of out-of-state tuition has risen dramatically. Per credit hour costs for an out-of-state student has increased approximately 80% within the past five years. As a result, an increasing number of out-of-state students are seeking reclassification.

The objective was to (a) communicate the complex criteria for obtaining Florida residency for tuition purposes, (b) provide a means by which out-of-state students can assess their eligibility for reclassification, (c) reduce the workload on University staff responsible for evaluating requests for in-state status and (d) improve the response time to student requests.

Design

The primary goal in developing the application was to create an on-line 'wizard' to effectively evaluate a student's eligibility for in-state status and if the student appeared to qualify, provide the student with a checklist of documents required by the Registrar's Office to support his request for reclassification. Since the majority of students qualify as either independent persons or dependents of parents living in Florida, the decision was made to limit the Residency Wizard's logic to handling these two scenarios. All exception circumstances would continue to be evaluated individually by Registrar's Office staff.

The design phase required documenting all of the business rules for residency reclassification. Technical staff in the Registrar's Office worked with operational staff to (a) determine how information would be presented, (b) insure consistency in wording between the website and printed media (i.e. University catalogs), (c) meet University website design standards and (d) incorporate logic to handle the complex criteria for meeting in-state status.

To assist with programming, a flow diagram of the business logic was documented and programming code included at all decision points within the Residency Wizard's evaluation logic.

The Residency Wizard was designed to require a secure sign-on from the student; students must enter their University ID and PIN in order to gain access. Eligibility for in-state status is based on an evaluation of student self-declared data and data housed in the University's student information system, OASIS. Each evaluation is student-specific.

All text displayed within the Residency Wizard was stored in a content manager and all program code in a SQL repository. This level of customization allowed for immediate changes to logic and messaging, allowing non-technical staff to make adjustments as business procedures change.

A prototype was programmed using PHP and MySQL. Test scenarios were identified and tested by operation staff that reviewed the prototype for functionality, ease of use and intuitiveness from a student perspective. Based on test results, logic changes were made and an iterative testing cycle initiated before operational staff gave sign off on the application. This process took approximately six months to complete.

Implementation

Upon successful completion of testing, the Residency Wizard was made available to students in June 2004. Initial usage was by students seeking reclassification for Fall term 2004. Registrar's Office staff, who met with students, would utilize the Residency Wizard during these initial counseling sessions. During this initial period, several minor changes were required to the application's design. Each change request was quickly accommodated as identified. It should be noted that the application was implemented with a relatively small development team consisting of the Associate Registrar, Assistant Registrar, Webmaster and Residency Counselor.

As time progressed, students calling and inquiring about residency reclassification were verbally directed to the website and urged to use the Residency Wizard.

After a soft roll out, the website URL was communicated to the University community at large, to provide links to the new Residency Reclassification website to insure students and staff throughout the University accessed the same information.

Benefits

Numerous benefits were noted immediately upon the application going live. These include:

- *Improved response time to student requests for reclassification.* While the University still requires the students to provide hard copy supporting documentation for a residency reclassification, students who use the Residency Wizard generally provide all required documentation at the time of submission. In August 2004, 90% of the requests received were approved within one business day. This is a significant improvement over the previous standard of a one to two week turnaround. In the past, Registrar's Office staff was often unable to render a decision until the student had been contacted to submit additional documentation.
- *Reduction in workload on Registrar's Office staff.* Since each student's circumstances are specific to the individual, Registrar's Office staff traditionally had to expend significant time in evaluating a reclassification request. With the Residency Wizard evaluating a student's credentials, staff now simply need to utilize the checklist to insure a student is submitting all of the required supporting documentation. Analysis of a student's financial independence or dependence is handled by the Residency Wizard.
- *Increased campus awareness of residency reclassification criteria.* In the past, students would often receive conflicting information regarding residency requirements from advisors, academic departments and student services staff. Now, almost all inquiries are referred to the website insuring criteria are consistently communicated.
- *Reduction in complaints stemming from denials.* Previous to the implementation of the Residency Wizard, many students were unclear in the requirements for reclassification. This resulted in a significant number of complaints and appeals from students who were denied after submitting their requests.

Retrospect

In retrospect, more time could have been expended on testing and refining the business rules for residency reclassification. While an iterative approach was taken when testing the prototype, issues uncovered after implementation could have been addressed at an earlier point in the development process.

The application was written from a continuing student perspective and requires the student to sign on with his University ID and PIN. Since implementation, interest has been expressed for modifying the Residency Wizard to handle applicant inquiries as well as implementing a staff interface. The latter would allow a University staff member to evaluate a student's eligibility thus allowing the reclassification process to be decentralized.