



A Message from Stephanie Lester

Stephanie Lester
Associate Director of Student Accounts
Student Accounts & Billing Office
Emory University

We have a saying in the Student Accounts and Billing Office (SABO), **"Financial Aid giveth, and we laugh away!"** At least, that's how we are often portrayed as just a collection agency! However, our office—renamed Student Finance Services in 2022, does so much more than collect tuition and fees.

Tuition and Fee Assessment

The SABO Systems Team, led by Sr. Director Jack Metropol, works tirelessly to update tuition rates, apply for fee waivers, and troubleshoot accounts. Among many other things, they manage increasing departmental files, which assess parking permits and fines, library fines, student health charges, etc., monitor transactions flowing to the university's general ledger, and generate the 1098-T tax forms.

In addition, the entire financial aid team and fees, the SABO Systems Team generates all email notifications related to charges, payments, and refunds to our students.

FUN FACT?

In FY24, SABO managed over \$1B in tuition and fees on the student accounts.

Institutional Loan Portfolio

While the Office of Financial Aid is responsible for awarding loans to our students, SABO manages Emory's institutional loan portfolio. We work with our lending service, ECSL, to request promissory notes, entrance counseling, and other required loan disclosures from our student borrowers. We collect and process loan deferment requests and cancellations on some federal loans, as well as collect payments and develop special payment arrangements. Many years ago, all of this required documentation was on paper, with students coming into our office to complete their loan requirements. Thankfully, all this documentation is now electronic, allowing for a seamless experience for our student borrowers.

FUN FACT?

In FY24, SABO managed over \$205M in institutional loans.

Customer Service and Account Advising

Above all else, SABO is a front-facing office working tirelessly to assist our students, their families, and departments around campus. Our team of account advisors includes three Student Account Advisors—Chamessa Elliott, Sandra Gray, and Khloe Gaston, and two Senior Student Account Advisors—Cindy Brock (who has been in our office for 30 years) and JeMonte Collins, who will soon celebrate his 10th anniversary at Emory. SABO works with our students via phone, email, video conference, and in person at our suite in the B. Jones Building. SABO sets the published tuition deadline each semester, and we offer monthly payment plan options for both domestic and international students; however, our team often works with students on their individual financial needs, developing personalized payment arrangements.

Student Payments

But also, the main thing we do is bill for tuition and collect tuition payments. Tuition collection may seem straightforward, but so many processes are running in the background to ensure accurate and timely updates for our students.

You may recall a time when our Cashier's window was open. The Cashier's window was closed during the height of the COVID pandemic to help with social distancing, but even when it was open, students did not use it. We took the opportunity to bring SABO into the 21st century by eliminating the Cashier's window and the ability to make cash payments, all to improve efficiency and fiscal responsibility while saving time for our students.

We took it a step further in December 2022 by implementing OPUS Cashiering. Utilizing this delivered and now highly customized—PeopleSoft module has allowed us to post check and wire payments in real-time, significantly reducing student inquiries, unnecessary holds, and finance charges.

FUN FACT?

In FY24, SABO collected over \$453M in student payments.

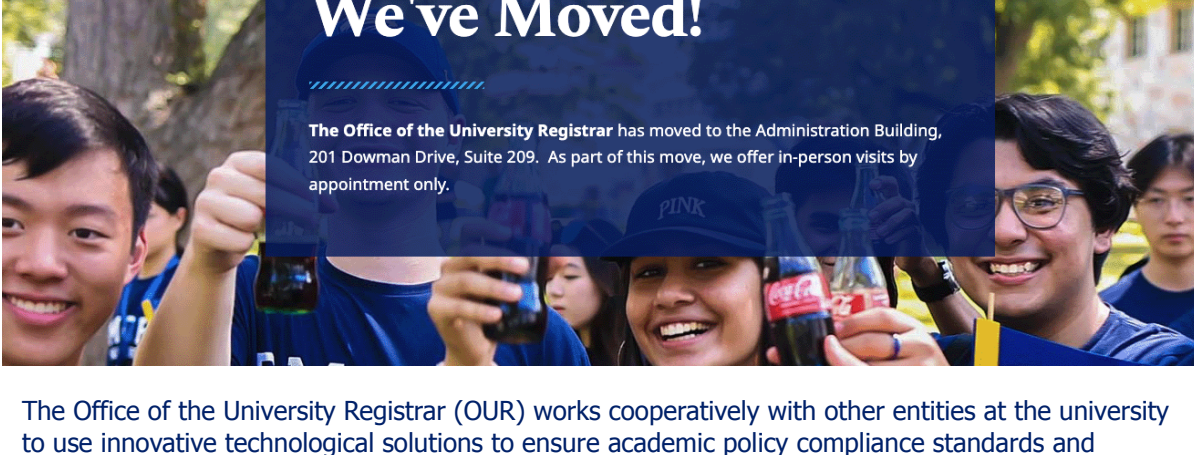
Current/Upcoming Projects

In May 2024, SABO officially launched our new past-due payment plan with Flywire. Prior students can now set up formal, long-term payment plans for outstanding tuition balances, allowing them to avoid extra finance charges and pay off debts at a pace that suits their financial needs. In addition to the established plans, we can create customized plans for these students—providing even more flexibility to students and families. Lastly, the new past-due payment plan gives our prior students the added option of paying via credit card.

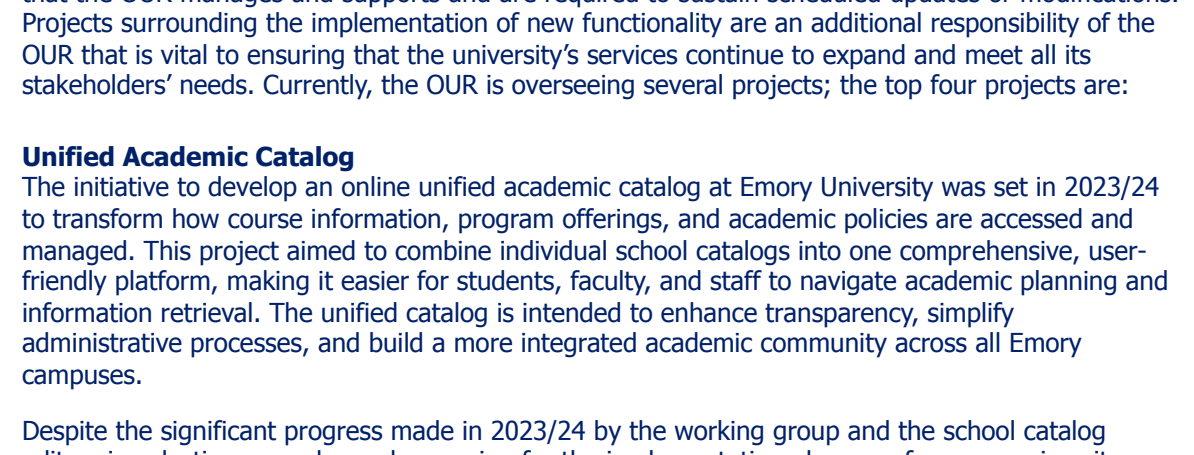
In July, SABO launched the Ivy Chatbot at our website, studentaccounts.emory.edu. With nearly 750 individual inquiries logged, the Ivy Chatbot has proven to be an essential extra layer of customer service for our students.

Expanding our payment options has been a frequent request from many of our students. SABO is continuously reviewing new payment options to add to OPUS. We only offer payments via US checking or savings accounts directly in the OPUS student portal.

Many exciting things are happening at SABO. We were happy to share what we are doing to improve the student experience.



Office of Financial Aid



ISIRI/ruv

What is FAFSA? Free Application for Federal Student Aid (FAFSA). Completing and submitting the FAFSA is free and gives students access to the largest source of financial aid for school. Students must submit the FAFSA application on time to have an opportunity to receive federal aid. States and colleges also use FAFSA information to award their own financial aid packages.

In 2024, Congress passed the FAFSA Simplification Act, which led the U.S. Department of Education to overhaul the FAFSA process by shortening the application and making other changes. These changes caused a delay in the application release, which created many issues, technical glitches, and delays for financial aid offices, students, and families nationwide.

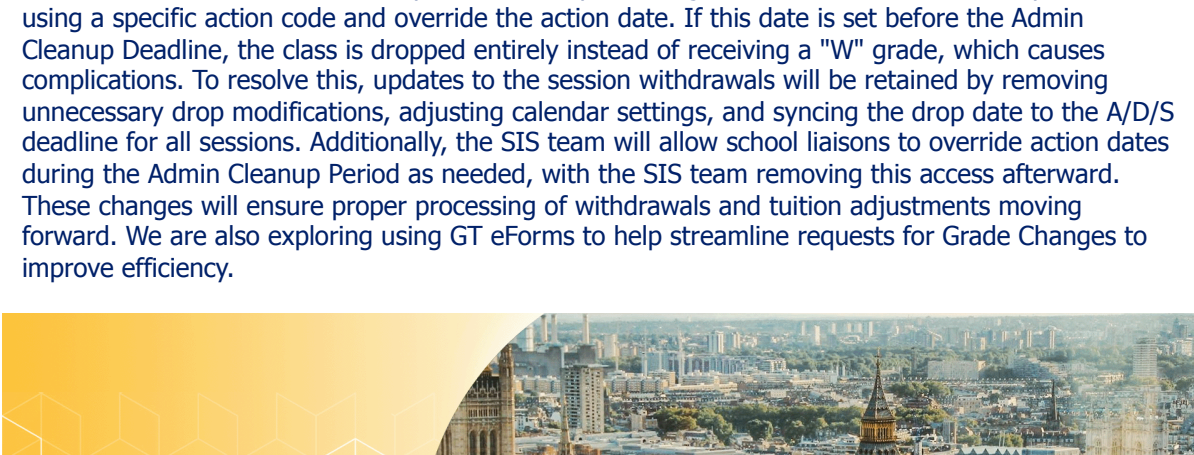
Our financial office not only survived this treacherous year, but they overcame what was thrown their way by still meeting every posted deadline for every admit population and having financial aid packages released for the returning students in a timely fashion. It took a village!

While many schools across the country struggled during this time, every unit within our office, systems, advising, student services, and analytics came together to conquer the 2024 challenge that faced us.

ISIRI/ruv became the slogan for the National Association of Student Financial Aid Administrators (NASFAA). ISIRI stands for Institutional Student Information Record (the version of the FAFSA that the schools receive from the Department of Education).

FAFSA-only schools had the most significant issues because the FAFSA was the only application they had to rely on and now they were facing constant delays. Even schools that used the CSS profile, as we do, had some processing issues with technology and systems, but luckily, we have a great systems and operations team that was able to make things work and keep us on schedule with funding our students.

Office of the University Registrar



The Office of the University Registrar (OUR) works cooperatively with other entities at the university to use innovative technological solutions to ensure academic policy compliance standards and safeguard student data. The OUR researches and considers potential consequences in determining each new project's viability. System maintenance enhancements are the largest group of projects that the OUR manages and supports and are required to sustain successful academic operations. Projects surrounding the implementation of new functionality are an additional responsibility of the OUR that is vital to ensuring that the university's services continue to expand and meet all its stakeholders' needs. Currently, the OUR is overseeing several projects; the top four projects are:

Unified Academic Catalog

The initiative to develop an online unified academic catalog at Emory University was set in 2023/24 to transform how course information, program offerings, and academic policies are accessed and managed. This project aimed to combine individual school catalogs into one comprehensive, user-friendly platform, making it easier for students, faculty, and staff to navigate academic planning and information retrieval. The unified catalog is intended to enhance transparency, simplify advising processes, and build a more integrated academic community across all Emory campuses.

Despite the significant progress made in 2023/24 by the working group and the school catalog editors in selecting a vendor and preparing for the implementation phase, unforeseen university budget cuts have unfortunately delayed this project. As a result, we could not move forward with the catalog as planned. However, we are optimistic about resuming the project in 2024/25 and are eventually delivering a streamlined, efficient catalog that will benefit the entire Emory Community.

Curriculum Management Software

There is enormous interest in implementing a cutting-edge curriculum management tool that promises to centralize, optimize, and streamline Emory's entire curriculum development and management process. As the academic world evolves rapidly, driven by changing work environments and new educational demands, it has become increasingly important to modernize our approach to curriculum management.

Curriculum management software is designed to enhance collaboration among faculty, making it easier for them to work together on course and program development. It will also improve course and program information transparency, ensuring stakeholders have clear and up-to-date insights into academic offerings. Additionally, an integrated tool will facilitate efficient tracking of curriculum changes, which is essential for maintaining the highest academic standards and ensuring compliance with evolving regulations.

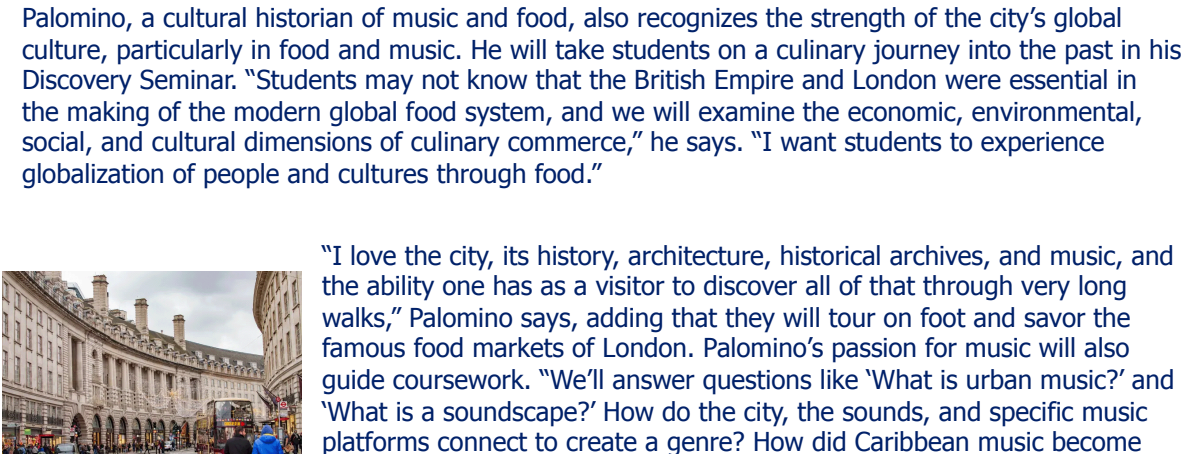
By providing a comprehensive platform for planning, approving, and monitoring academic offerings, a tool will enable Emory University to better adapt to the dynamic needs of students and the academic landscape. This modernization is a desirable objective and a crucial step toward maintaining our commitment to academic excellence and operational efficiency in an ever-changing educational environment.

Repeat Check and Processing Project

The Office of the University Registrar is refining the Repeat Courses Check Rules, focusing on streamlining processes and reducing manual effort. This includes implementing the delivered Repeat Rules and Repeat Process, and setting up the course catalog in OPUS to support these rules, which will uniformly guidelines can be applied across programs. By leveraging the delivered repeat process, the Registrar's Office aims to reduce the amount of manual intervention needed for repeat processing and degree tracking, ultimately making the system more efficient and consistent. These improvements are expected to enhance the accuracy and ease of managing repeat course enrollments.

Session Withdrawal and Grade Change Process Improvements

After joining the School Administrative Cleanup Period following the Add/Drop/Swap period, an issue arose with processing tuition adjustments for session withdrawals in cases where the deadlines occurred before the Admin Cleanup Date. When processing a withdrawal, staff must drop the class using a specific action code and override the action date. If this date is set before the Admin Cleanup Deadline, the class is dropped entirely instead of receiving a "W" grade, which causes complications. To resolve this, updates to the session withdrawals will be retained by removing unnecessary drop modifications, adjusting calendar settings, and syncing the drop date to the A/D/S deadline for sessions. Additionally, the SIS team will ensure that all up-to-date insights into academic offerings are available during the Admin Cleanup Period as well as the SIS team removing this access afterward. These changes will ensure proper processing of withdrawals and tuition adjustments moving forward. We are also exploring using C7 forms to help streamline requests for Grade Changes to improve efficiency.



Oxford College, Office of Enrollment Services

First-Year Students to Study Abroad in London Through New Oxford Program

In Fall 2025, 50 incoming Oxford students will journey across the Atlantic Ocean to live and study in the historic home cities of Buckingham Palace, Big Ben, Notting Hill, and Tower Bridge.

Oxford Launch: London is a transformative opportunity for first-term students to live, learn, and explore the bustling capital city known for its rich history, culture, fashion, and art.

The inaugural program will be led by Oxford faculty members Associate Professor of Latin American and Caribbean Studies Pablo Palomino and Assistant Professor of English Sarah Higginbotham. They will accompany the students to London and teach two of their courses. In addition to delving into this renowned British city's rich history and vibrant culture, Palomino and Higginbotham will also provide mentorship, support, and college advising for students throughout their time abroad and when they return to Oxford to finish their first and second years.



"Global education is critically important as we prepare students to live, work, and thrive in an increasingly interconnected and complex world," says Oxford Dean Beala Abad. "The Oxford Launch: London program will provide students with a unique opportunity to experience an Oxford education—one that values experiential, practice-based, and purpose-driven learning—in the heart of London. With historic London as their classroom, students will engage with the world's rich cultural and academic landscape and develop essential life skills—resilience, adaptability, and an expanded worldview."

Oxford Launch: London is a signature program of Global Oxford with the Oxford Center for Pathways and Purpose and has partnered with ISS Abroad, a premier leader in study abroad and experiential learning programs.

The program's goal is to help students gain a deeper understanding of British culture and history, as well as Britain's global impact on Western art, literature, and financial and political systems. Says Daphne Orr, senior director of Oxford Global, "The program is part of the college's vision to bring Oxford to the world and the world to Oxford and is ideal for students ready in their first term to engage broadly and deeply with a global community."

Students to Experience Bards and Barriers, Cultural History and Global Commerce
Students will attend classes at the ISS London Center, close to The British Museum, St. Paul's Cathedral, Smithfield Markets, and Covent Garden during their semester abroad. While participating, they will live in a residence hall in the Camden/Kensington Town neighborhood in northwest London with nearby Underground transit stations, restaurants, grocery stores, bakeries, and coffee shops.

"I am excited to feel Shakespeare's art come to life in his hometown of Stratford-upon-Avon, where we will immerse ourselves in the English Renaissance. We'll study Shakespeare's plays in the classroom, then head to the West End and the Globe to see the plays performed by world-class actors," Higginbotham shares. Students will also be able to study archival materials housed in the Bodleian Library and Hereford Cathedral Library.

"We'll go to the British Library's Rare Manuscript Room and turn the pages of 400-year-old books. Students will never forget the experience of investigating archival materials for their own work."

Higginbotham is fascinated by the interconnectedness of London's influence as a metaphor in the work of literary giants such as William Shakespeare, William Blake, Charles Dickens, and George Eliot. In her Discovery Seminar, a course that every Oxford first-year student takes as the first step in the College's signature general education curriculum, students will explore how "metaphors change the way we think about complex ideas like war, time, economy, love, illness, drugs, gender, justice, and race," she notes. "Using field research and psychological studies, we will discover and experience how the dynamic city of London has functioned as a metaphor through the centuries."

Palomino, a cultural historian of music and food, also recognizes the strength of the city's global culture, particularly in food and music. He will take students on a culinary journey into the past in his Discovery Seminar. "Students may not know that the British Empire and London were essential in the making of the modern global food system, and we will examine the economic, environmental, social, and cultural dimensions of culinary commerce," he says. "I want students to experience globalization of people and cultures through food."

"I love the city, its history, architecture, historical archives, and music, and the ability one has as a visitor to discover all of that through very long published in Columbia University's Teachers College Record. He is networking and consistent, famous food markets of London. Palomino's passion for music will also guide coursework. "We'll answer questions like 'What is urban music?' and 'What is a soundtrack?' How do the city, the sounds, and specific music platforms connect to create a genre? How did Caribbean music become British, and vice versa?" He could even visit the mythical Abbey Road recording studios to trace global interactions in the Beatles' catalog and museum."

In addition to class excursions, Oxford students will visit historic sites and world-class museums in destinations like Edinburgh, Scotland, Bath and Stonehenge, Brighton, Cambridge, Canterbury, and Dover. With a robust schedule of co-curricular activities, On orders, "Oxford Launch: London will be life-changing for students and their professors. To live in and experience the nuances of another culture broadens our perspectives, enhances human understanding, and opens a world of opportunities for new personal pathways and purposes."

Students will supplement the courses taught by Higginbotham and Palomino with additional classes, preparing them for continued academic success when they return to Oxford and reunite with classmates they met before traveling abroad.

"Beyond heading to London, these first-year students will engage in Oxford's comprehensive orientation program and take part in time-honored traditions like the iconic 'Coke Toast' and the Oxford Olympics," says Dean Abad. "These experiences will allow for meaningful connections to their classmates and a warm welcome into the Oxford College community."

Office of Admission



In addition to reading more applications than ever, the Office of Admission is gearing up for an exciting spring with several key events on the horizon.

NEW! Early Access Programs

The Office of Admission will host two Early Access events for our admitted Early Decision students on Saturday, February 22, and Friday, March 21, 2025. These programs will provide early engagement opportunities, including panels, tours, and lunch with campus partners. We are coordinating with many divisions across Emory, including GBS, SON, Pathways, the Hatchery, the Pantheon, and others, to offer a rich and immersive experience.

Southern Association for College Admission Counseling

The association's largest professional development event is the Southern Association for College Admission Counseling (SACAC) annual conference. The Annual Conference includes a dynamic lineup of speakers and presenters, engaging sessions, opportunities for networking and outreach, and access to the latest in products and services through the exhibit hall. This year's annual conference is held at the Marriott Marquis in Atlanta, Georgia, from March 20-31, 2025.

The Office of Admission will host an event that offers opportunities for college tours, optional wellness and athletic programming, a conference outreach project, the networking college fair, and local public high school counselor day. In collaboration with the SACAC Conference happening in Atlanta, the Office of Admission at Emory will welcome visiting high school counselors, CBO counselors, and Independent Counselors to campus on March 29 and April 1, 2025. This is an excellent opportunity to showcase Emory and strengthen relationships with key counseling professionals across sectors.

Preview Day 2025

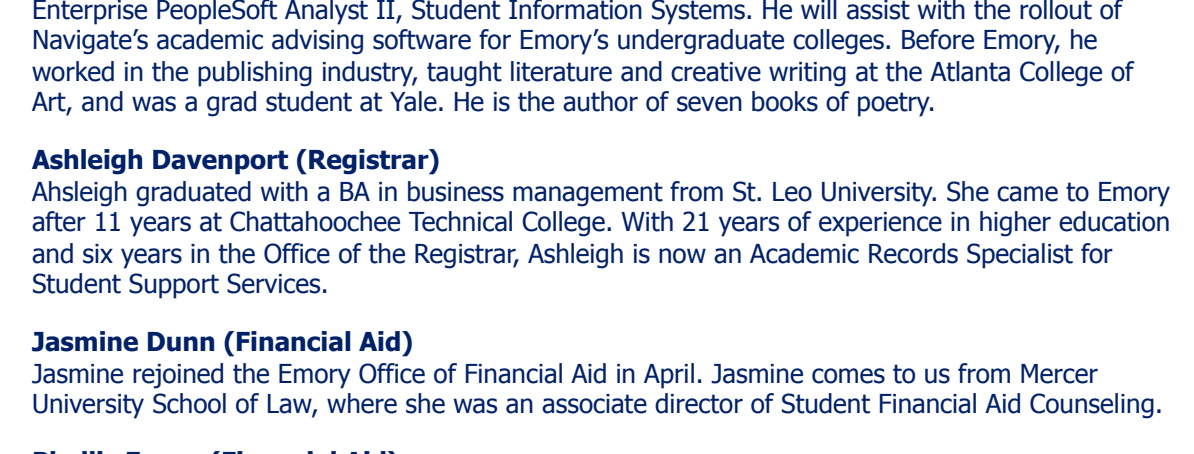
Could you mark your calendars for Friday, April 11, 2025? Preview Day will provide admitted students and families a comprehensive look at Emory through academic sessions, student panels, and campus tours. We coordinate with many divisions across Emory, including GBS, SON, Pathways, the Hatchery, the Pantheon, and others, to offer a rich and immersive experience.

Students and their families will have the chance to learn one-on-one about the school's facilities, the programs within each school, and what you can expect to see with your degree. Students will also meet with faculty, staff, and students eager to tell you about your program of interest.



Since May 2024, Lou Ocasio has taken on the role of Deputy University Registrar for Operations. This new position follows five rewarding years at Emory as the Associate University Registrar for Academic Support Services. His career spans diverse roles, including a decade at Georgia Tech's Office of the University Registrar, eight years at the University of Miami's Office of International Admission, and a formative period at the University of Maryland at College Park's Office of Enrollment Services.

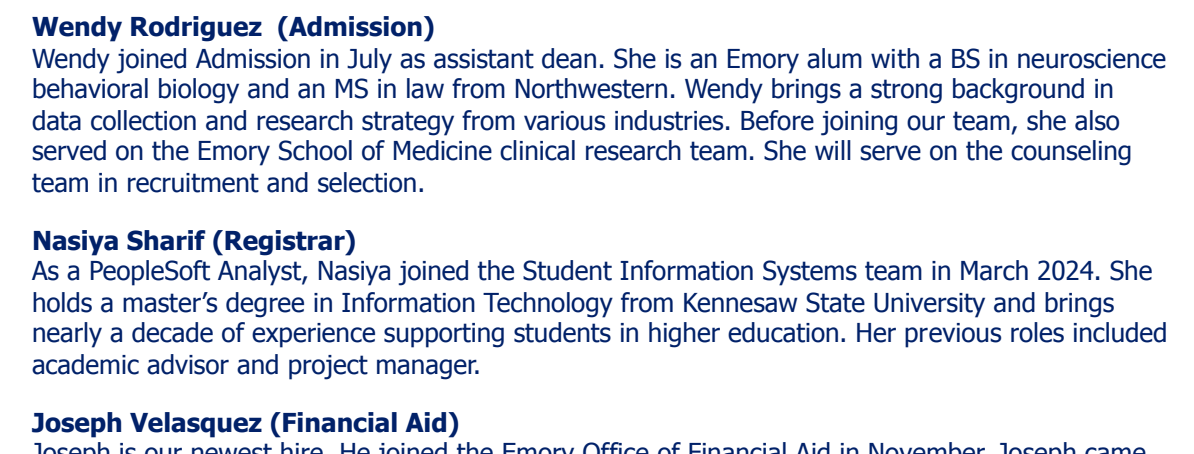
In his current role, he's thrilled to lead a dedicated and talented team across several key units: Student Support Services, Compliance and Data Localization, Academic Support Services, and Training and Documentation. Together, they are focused on advancing the student experience through impactful University Registrar projects and initiatives.



Kurt Haas
Deputy University Registrar
Office of the University Registrar
Emory University

In May 2024, Kurt Haas began the shift into the Deputy University Registrar for Systems and Strategic Initiatives role, which has already been an interesting experience. His journey at Emory started when he joined the Student Information Systems team as a business analyst in 2006 after 13 years as a CRM consultant and contract developer. While on the SIS team, he worked with the housing software (Admission), Online, and PeopleSoft (CRS), supporting various offices such as housing, admissions, and student records. At the end of 2019, he moved into the Office of the University Registrar as Director of Data Management and Decision Support just in time to be involved with the operational challenges introduced by COVID.

Having survived that transition, Kurt is excited to move into his new role, where he will learn more about OUR technology support teams and how they work together to meet various technical and operational needs. This will include the Data Management Systems team, the School, Technology Support Services, and Student Information Systems teams. Kurt will begin by documenting each team's roles, responsibilities, and service offerings so that the college, department, and administrative customers can better understand how we support their work and implement new solutions.



Welcome Aboard

Andrew Abad (Oxford College Office of Enrollment Services)

Andrew joined us from Michigan State University's Honors College in August, where he served as an assistant director of admission. Andrew was responsible for designing and implementing recruitment plans, managing strategic communications, and evaluating admission targets. Andrew is an avid baseball fan whose goal is to visit all 30 MLB stadiums. Even more, he comes to us with an affinity for the Braves.

Zaynab Abuhakima (Admission)

Zaynab joined admission in August as an admission advisor. She recently graduated from Davidson College with a BS in Physics. Zaynab gained valuable experience in enrollment as an admission fellow while attending Davidson. She will work on the counseling team in recruitment and selection.

Dan Askew (Admission)

Dan joined admission in June as an Operations Systems Analyst. He has a BS in computer science from Eastern Oregon University. Dan has extensive knowledge and experience in developing procedures and maintaining databases in college enrollment while working at Reinhardt and Portland State University. He will serve on the IT/Operations team specializing in State.

Jessica Bradford (Oxford College Office of Enrollment Services)

Jessica joined the CSES team in January as the administrative assistant. Jessica comes to us from the Carla Museum, where she has worked as a Senior Security and Operations Officer for the last two years.

Kayla Bove (Oxford College Office of Enrollment Services)

Kayla, a former K-5 teacher, joined us in August. Kayla spent 7 years in Newton's classroom, helping to shape young and impressionable minds. In addition to her responsibilities as a teacher, Kayla served as an assistant site coordinator for after-school programs, functioned as the school team leader, and coordinated her school's 2023 summer school program. As an undergraduate student, Kayla was a student ambassador, which sparked her passion for helping students and their families navigate their educational journeys. She is an avid reader and a knack for creating better parties.

Latesha Burley (Financial Aid)

Latesha joined the Emory Office of Financial Aid in July. Latesha comes to us from Greenwich Technical College, where she managed a team of financial aid specialists, federal work-study employees, and other financial aid-related responsibilities.

Bruce Covey (Registrar)

As an affiliate, Bruce has been with Emory for 31 years, teaching creative writing in the college, directing bookstores, overseeing Campus Life Technology Services, and now working as an Enterprise PeopleSoft Analyst II, Student Information Systems. He will assist with the rollout of Navigator's academic advising software for Emory's undergraduate colleges. Before Emory, he worked in the publishing industry, taught literature and creative writing at the Atlanta College of Art, and was a grad student at Yale. He is the author of seven books of poetry.

Ashleigh Davenport (Registrar)

Ashleigh graduated with a BA in business management from St. Leo University. She came to Emory after 11 years at Chattanooga Technical College. With 21 years of experience in higher education and six years in the Office of the Registrar, Ashleigh is now an Academic Records Specialist for Student Support Services.

Jasmine Dunn (Financial Aid)

Jasmine rejoined the Emory Office of Financial Aid in April. Jasmine comes to us from Mercer University School of Law, where she was an associate director of Student Financial Aid Counseling.

Phyllis Evans (Financial Aid)

Phyllis joined the Emory Office of Financial Aid in September. Phyllis joined us after a sabbatical as a financial literacy specialist at Union County College in Cranford, NJ.

Lynnette Gamble (Financial Aid)

Lynnette joined the Emory Office of Financial Aid in April. Lynnette comes to us from the Emory Alliance Credit Union, where she has served as an ACH Specialist since 2002.

Kailey Graziotto

Kailey, an Oxford and Emory alum, joined our office as an admission advisor and helps oversee the SAA program alongside Kate Phelan.

Lauren Nunes (Admission)

Lauren joined Admission in October as a receptionist. She graduated from Georgia State University with a B.A. in Journalism and Mass Communication. Lauren enjoys extensive public relations experience from the retail and real estate law industry. She will be a part of our front desk team welcoming guests to campus.

Wendy Rodriguez (Admission)

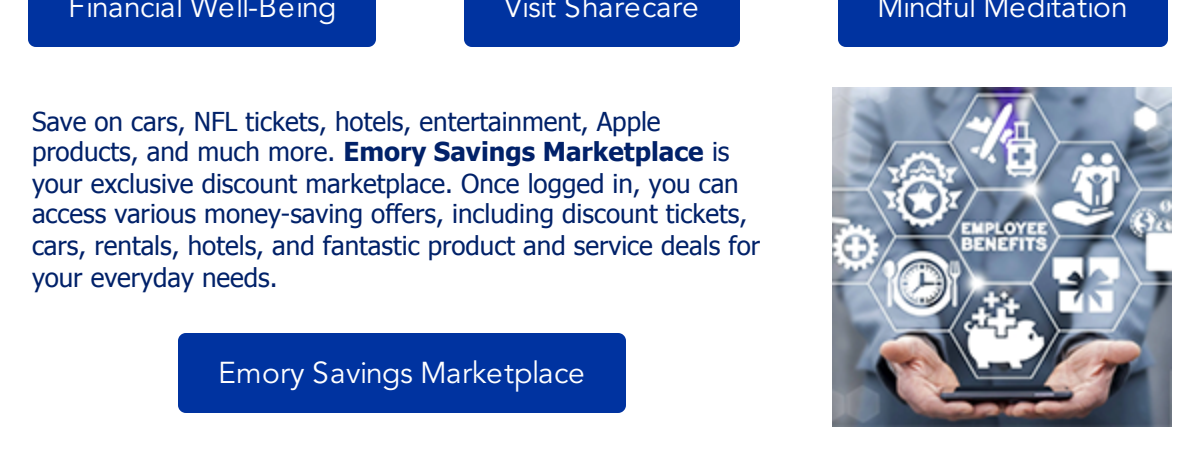
Wendy joined admission in July as assistant dean. She is an Emory alum with a BS in neuroscience behavioral biology and an MS in law from Northwestern. Wendy brings a strong background in data collection and research strategy from various industries. Before joining our team, she also served on the Emory School of Medicine clinical research team. She will serve on the counseling team in recruitment and selection.

Nasirya Sharif (Registrar)

As a PeopleSoft Analyst, Nasirya joined the Student Information Systems team in March 2024. She holds a master's degree in Information Technology from Kennesaw State University and brings nearly a decade of experience supporting students in higher education. Her previous roles included academic advisor and project manager.

Joseph Velazquez (Financial Aid)

Joseph is our newest hire. He joined the Emory Office of Financial Aid in November. Joseph came to us from Clayton State University (GA), wearing many hats. His primary role was in Financial Aid Systems, where he served as an Analyst. Joseph expects to earn his Master of Science in Information Technology in 2026.



Congratulations!

Dylan and Hilary Keene welcomed **Porter Theodore Keene**.

Jackie Schiavone welcomed **Walker** on April 4, 2024.

Allie Daniel welcomed **Henry** on July 10, 2024.

Danielle Marganoff and her husband, Steve, welcomed **Clare** in April.

Giles Eady and his wife welcomed **Giles Kenneth** in December.

Katie Phenix got engaged and is set to marry in May of 2025.

Dawn Jones became Mrs. **Dawn Horne** on April 20, 2024.

Above & Beyond

Janice graduated from Georgia State University with a degree in African Studies.

Emily Culbertson graduated from Emory's Essentials of Leadership program.

Congratulations to **Mark But**, Director of Admission, who recently had an academic book review published in Columbia University's Teachers College Record. He reviewed the book *First-Generation Student Experiences in Higher Education: Counterstories* by professors Carl E. James and Leanne E. Taylor. The book explores the personal stories of eight first-generation students who went to university in Canada through a unique program at New York University between 2001 and 2004. Read Mark's academic review in the February 2024 *Teachers College Record* Book Reviews section.

Cheers to **Tim Fields**, Senior Associate Dean for Admission, for his profile story in the Emory News Center.

William Grace earned his Master's degree in law from Emory.

Annette, **Pranod**, Associate Dean of Admission

Abby Gray, Business Manager

William Horne, Event Manager

Janice Ly, Senior Specialist, Business Operations

William Grace, Assistant Director of Financial Aid

Candace Rivera, Assistant Director of Financial Aid

Top Ranked

BEST QUALITY OF LIFE **BEST CLASSROOM EXPERIENCE** **HAPPIEST STUDENTS**
The Princeton Review, 2024.

- Early Decision I applicants for Emory College are up 21% from 2024.
- Early Decision I applicants for Oxford College are up 36% from 2024.
- SwapBot, the Enrollment Management chatbot, runs on all Atlanta EM websites and has served over 30,000 users.
- The Office of Admission launched a self-guided tour at the end of 2023, with over 80,000 visitors have used digitally or in person YTD.
- Incoming first-year student Lindsey Taylor was the featured soloist at the choir sang "The Road Home" before pallbearers brought Jimmy Carter's casket up the aisle and placed it on the catafalque.
- The number of students receiving aid through **Emory Advantage** increased dramatically, with 3,119 students benefiting from \$14.5 million in 2023 compared to 1,254 students receiving \$5.5 million in 2021-22.

