SFS1002- Design Document - FINAL

This design document serves as the blueprint for the SFS1002 course, showing content that will be covered and how it will be presented, to ensure all project stakeholders are aligned on the plan before development begins.

The course will be developed in accordance with proven adult learning theories, including Merril's Instructional Design Principles, Bloom's Taxonomy and Kirkpatrick's 4 Levels of Evaluation, and will be authored in Articulate Rise 360, with animated sequences produced using Vyond.

Other Project Documents:

SFS Needs Analysis Report

Course Title:	SFS1002 - How to Use SFS Systems
	Course Description: This online self-paced course provides staff with the foundational knowledge and skills to effectively use Stanford's core student financial systems: Axess and Flywire. This training is essential for staff who work with students and their financial data. The course covers how to review a student's financial history in Axess, the internal 'system of record', and how to navigate Flywire, the student-facing platform for viewing transaction histories and making payments. Completion of this course is a prerequisite for gaining access to the Flywire system, ensuring users are competent and confident in performing critical tasks that directly impact student accounts. Training Sequence: This course is part of a series of courses created to prepare staff to work within Student Financial Services (SFS). ● SFS1000 - GFS Item Types ● SFS1001 - Course Fee Set Up ● **SFS1002 - How to Use SFS Systems**

Goals:

The following instructional goals define the strategic purpose of this course and the intended impact of the learning experience on the user:

- **Ensure Accurate and Compliant System Usage:** Equip staff with the knowledge to use Axess and Flywire correctly, mitigating risks associated with errors that have a direct financial impact on students.
- **Differentiate Between Core Financial Systems:** Enable users to clearly distinguish between the roles and functions of Axess as the internal system of record and Flywire as the student-facing payment platform.
- **Build Foundational Proficiency in Key System Tasks:** Develop user competency in core functions, including viewing financial history in Axess, searching for payers, interpreting account summaries, reviewing account activity, and processing payments in Flywire.
- **Empower Staff to Effectively Support Students and Authorized Payers:** Provide staff with the skills to confidently answer questions and guide students and their authorized payers through common financial inquiries and payment processes.
- **Clarify the System Access and Compliance Pathway:** Provide users with a clear roadmap for requesting and receiving system authority for Flywire upon successful completion of the training.
- **Ensure Successful Skill Transference to the Workplace:** Use practical demonstrations and assessments to provide confidence to both the user and the institution that the training has resulted in measurable job-readiness.
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Learning Objectives:

By the end of this course, staff members with graduate student funding responsibilities will be able to:

	• Identify the steps needed to access and review a student's financial history in Axess. • Describe the information required to search for a student or authorized payer in Flywire. • Explain the key components of the Flywire account summary screen. • Summarize the process for accessing account activity. • Recall the necessary steps for completing a payment in Flywire.
Time to complete course:	30 minutes **estimated*

Course Home Page:	
Content:	**Block Type**

1. Welcome
2. Save Your Progress
  a. Always use the Exit Course button
  b. Email SFS/SFS SNOW ticket for assistance with course
3. Accessibility
  a. Contact SAS/UXDS if you encounter any barriers
4. Select the Start Course button to begin the course
	Text

Lesson 1: Course Introduction	
Content	**Block Type**
01: Introduction: 1. Welcome a. Narrator Introduction 2. Course Purpose: Overview of Axess and Flywire a. Axess: Internal 'system of record' for student financial histories. b. Flywire: Student-facing platform for viewing transactions and making payments. 3. Let's get started - Learning Objectives	Video
02: Learning Objectives: 1. Identify the steps needed to access and review a student's financial history in Axess. 2. Describe the information required to search for a student or authorized payer in Flywire. 3. Explain the key components of the Flywire account summary screen. 4. Summarize the process for accessing account activity. 5. Recall the necessary steps for completing a payment in Flywire.	Rise Bulleted List

Lesson 2: The Reporting Landscape	
Learning Objectives: ● Identify the steps needed to access and review a student's financial history in Axess.	
Content	Block Type

03: Viewing Financial History in Axess: 1. Logging in and navigating the menus: a. Admin > CS Admin > Student Financials > Charges and Payments > View Financial History by Term. 2. Adding the page to 'My Links' for easy access. 3. Searching for a student using ID, first name, or last name. 4. Understanding the 'Account Activity' page layout. 5. Filtering transactions by date range or by term. 6. Understanding the 'Transactions' section columns: a. Posted Date b. Item c. Term d. Charge e. Payment f. Refund 7. Interpreting positive vs. negative numbers. 8. Locating the balance and subtotals. 9. Exporting the transaction table to an Excel spreadsheet.	Video
04: Axess Review Activity 1. An interactive activity where the user follow on-screen prompts to review how to: a. Navigate to the 'View Financial History by Term' page. b. Search for a student. c. Filter the results by a specific term. d. Identify the total balance for that term. e. Export the results.	Rise Sequence Block

Check For Understanding:

Lesson 3: Introduction to Flywire	
Learning Objectives: ● Describe the information required to search for a student or authorized payer in Flywire.	
Content	**Block Type**
05: Introducing Flywire & Gaining Access 1. Overview of Flywire as the online billing and payment system. 2. How to Request Access: a. Download certificate of completion from STARS. b. Navigate to sfs-learn.stanford.edu. c. Use the 'Request Systems Access' link to open a Service Now ticket. 3. Logging in and selecting the 'Employee' user type. 4. Searching for a Student or Authorized Payer: a. By Account ID (8-digit Student ID). b. By First and Last Name. c. By Payer Email Address.	Video
Check For Understanding:	

Lesson 4: Navigating Flywire Accounts	
Learning Objectives: ● Explain the key components of the Flywire account summary screen. ● Summarize the process for accessing account activity.	
Content	Block Type
06: Understanding the Flywire Interface 1. Covers the following screen components and actions: a. Account Summary Screen: i. Current Account Balance, Less Anticipated Aid, Balance Due. ii. 'Make A Payment' button. iii. 'Terms Summary' cards. iv. 'Quick Links' section (Financial Holds, Authorized Users, etc.). b. Account Activity Tab: i. Navigating term tabs and using 'Show/Hide Older Terms'. ii. Expanding/collapsing sections for Charges, Payments & Credits, and Other Term Balance. iii. Printing a Term Statement (PDF). iv. Understanding the 'Total Balance Due' section. v. Generating a custom activity report by date or term.	Video
07: Flywire Review Activity 1. An interactive activity where the user follow on-screen prompts to review how to: a. Search for a student. b. Identify the 'Balance Due' on the Account Summary screen. c. Navigate to the 'Account Activity' tab for a specific term.	Rise Sequence Block

d. Expand the 'Charges' section to find a specific charge amount. e. Generate a custom report for a specific date range.	
Check For Understanding:	

Lesson 5: Payment Plans & Making Payments in Flywire	
Learning Objectives: ● Recall the necessary steps for completing a payment in Flywire.	
Content	Block Type
08: How to Make a Payment in Flywire 1. Covers the following concepts and steps: a. Quarterly Payment Plans: Overview of how they allow installment payments. b. Initiating a Payment: i. Selecting the 'Make A Payment' button. ii. Entering the payment amount. c. Payment Methods: i. eCheck (US Bank Account): Entering account holder info, routing/account numbers, and saving the method for future use. ii. International Payment via Flywire: Acknowledging external fees, selecting country of origin, choosing payment currency, and confirming payer information to initiate the bank transfer.	Video

Check For Understanding:

FInal Assessment	
Content	Block Type
16: FInal Assessment Intro 1. Brief introduction framing the upcoming assessment as a confirmation of understanding before course completion.	Video
FInal Assessment	Rise Assessment Block

Lesson 7: Course Conclusion	
Content	Block Type
17: Course Conclusion You have completed SFS1002: How to Use SFS Systems Let's review our learning objectives for this course	Rise Text Block

Learning Objectives: 1. Identify the steps needed to access and review a student's financial history in Axess. 2. Describe the information required to search for a student or authorized payer in Flywire. 3. Explain the key components of the Flywire account summary screen. 4. Summarize the process for accessing account activity. 5. Recall the necessary steps for completing a payment in Flywire.	Bulleted List
18: Next Steps 1. Congratulations! a. Congratulations and summary. b. Completion allows users to request Flywire access. c. Information on where to find ongoing support and resources. d. Call to action to complete the post-course survey. 2. Congratulations and best of luck working with Stanford's financial support systems! 3. To ensure your record of successfully completing this course is saved in STARS, select the Exit Course button in the upper right of your screen	Video
19: Next Steps 1. SFS-Learn a. Go to SFS-LearnStanford.edu for on-demand resources 2. Help Ticket a. If you need further assistance, please submit a help ticket 3. Post-Course Survey a. We'd love to hear your feedback on this course	Button Stack Block

4. Course Exit a. Select this button to exit the course and record your results in STARS.	