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PROFILE

An experienced **information technology professional** with expertise in the areas of **PC applications development, training, and support; web design and building; FOCUS language applications; LMS (Loan Management System) administration; and accounting functions.** A diligent and conscientious worker with an aggressive desire to formulate and implement more efficient office processes. Strong communications and interpersonal skills with a record of success working both individually and as part of a team.

EDUCATION

The University of North Carolina at Chapel Hill 1970 - 1974
Chapel Hill, North Carolina
B.S. in Business Administration

WORK EXPERIENCE

Loan Repayment Services 1978 - present
Office of Student Accounts and University Receivables
(formerly the Loan Section of the Office of Scholarships and Student Aid)
The University of North Carolina at Chapel Hill

Position titles: **Student Loans Systems Manager** 1982 - present
Accounts Supervisor 1978 - 1982

State Personnel Job Classifications for these position titles:

Computer Production Specialist	1994 - present
Data Processing Coordinator II	1991 - 1994
Data Processing Coordinator I	1990 - 1991
Accounting Tech II	1984 - 1990
Clerk-Typist IV	1978 - 1984

18 years of experience managing SLS/LMS (Loan Management System, a product of SCT), the complex mainframe accounts receivable system used by UNC-CH to collect federal campus-based and University long-term and short-term student loans. This system has a current active portfolio of more than 9,600 borrowers having over 12,000 loans. Managing this system involves:

- ◆ **researching and analyzing** system problems and errors and following them through to resolution
- ◆ **collaborating with the vendor** on product enhancements and problem resolutions to ensure that they meet federal and functional requirements
 - Was deeply involved with the vendor in the redesign of the initial system, SLS (Student Loan System), into the current system, LMS. The change transformed a 2-screen batch-only processing system into an approximately 100-screen real-time and batch processing system. The results of my testing and recommendations are reflected in many of the screen procedures used by and reports available from the current version of LMS.

- ◆ **testing and analyzing** system vendor upgrades, enhancements, and fixes to problems and errors
- ◆ **establishing and managing** security on 126 screens comprised of over 1,000 data elements. In order to ensure the most effective use of LMS, this function requires working with each system user to understand his/her duties so that appropriate screen/element access is available without compromising the integrity of the data.
- ◆ setting up and managing fund rules for all federal and University loan funds. There are currently 120 loan funds in LMS.
- ◆ setting up and managing over 2,275 federal entitlement rules, each of which has multiple stipulations, for the 120 loan funds in LMS
- ◆ managing over 5,075 accounting rules to transfer LMS accounting data to FRS (Financial Records System)
- ◆ establishing daily, monthly, annual, and on-demand program run parameters and routines
- ◆ **providing ongoing support** for LMS to all office personnel
- ◆ **training** new personnel in the use of LMS
- ◆ acting as liaison between Loan Repayment Services, the AIS (Administrative Information Services) programmer, and the vendor
- ◆ **providing consultation and assistance**, as requested, to other LMS users in schools across the country

18 years supervising and performing Loan Repayment Services accounting functions:

- ◆ supervising the Loan Repayment Services Accounting Clerk in daily and monthly balancing of accounts receivable and cash for a \$35.25M loan portfolio
- ◆ supervising the logging and record keeping of all financial data entry transactions to ensure proper audit trails
- ◆ providing information for completion of the federal Fiscal Operations Reports
- ◆ determining eligibility for work/service loan cancellations based on federal regulations

11 years of experience in personal computing functions:

- ◆ **assessing computing hardware and software needs** of Loan Repayment Services
- ◆ **researching, recommending, and installing computer hardware and software** for Loan Repayment Services.
 - Recently installed new Win98 PCs at all Loan Repayment Services employee workstations, re-establishing connections to all network applications and the AIS mainframe.
- ◆ **overseeing the operation of 10 PC workstations, 1 laser printer, and 2 dot matrix printers** in Loan Repayment Services
- ◆ **providing training and support** to all Loan Repayment Services personnel **in the use of all computing equipment**
- ◆ **providing training and support for all commercial PC applications** used in Loan Repayment Services **such as the MS Office components** and various programs and applications used to obtain data housed at other entities such as the credit bureaus, National Student Loan Database System, and National Student Loan Clearinghouse
- ◆ **trouble shooting PC-related problems** in Loan Repayment Services as well as some PC problems in OSSA (the Office of Scholarships and Student Aid) and some network-related problems on the OSSA server which services OSSA and Loan Repayment Services
 - One investigation provided a solution for a critical issue that had plagued the network for many months. The problem prohibited multiple users from running MS Access simultaneously which was greatly reducing office efficiency.
- ◆ **developing, instituting, and maintaining many PC applications in MS Access, MS WORD, MS Excel, MS Powerpoint, Paradox, Lotus 1-2-3, DOS batch files, and assorted other small programs** for Loan Repayment Services as well as some applications for the OSSA and Work-Study personnel.

With a small Loan Repayment Services staff (8) and a large loan and borrower portfolio, automation of office and collections functions outside of the capabilities of LMS greatly aids in work efficiency and, therefore, collections effectiveness. Some procedures I have automated are:

- MS Access application to balance daily and monthly financial transactions created in LMS. This application serves as a check to LMS for accounts receivable. Also, since LMS does not carry loan fund cash balances, this is the sole source of cash balancing in Loan Repayment Services and serves as a check of FRS loan fund cash balances for the Office of Scholarships and Student Aid accountant.
 - MS Access application to calculate individual work/service cancellations as well as provide monthly and yearly cancellation summary reports for federal Fiscal Operations Reports
 - MS Excel application to summarize receivables and cash data for Fiscal Operation Reports
 - MS Access/MS WORD application to produce monthly and on-demand forms for borrowers requesting loan work/service cancellations
 - Paradox application to create promissory notes, loan checks, rolodex cards, data entry source documents, and fund reimbursement sheets for student emergency loans which are disbursed daily
 - Paradox application to create monthly bank drafts for over 300 borrower payments
 - many MS WORD individual and mail merge forms to do such things as create on-demand promissory notes and submission forms for assignment of defaulted loans to the U.S. Department of Education
 - Paradox application to complete new work-study student employee forms
 - Paradox application to create billing statements for the OSSA accountant to bill students who were overfunded
- ◆ **providing documentation and/or training for the above PC applications**
 - ◆ **providing training and support to OSSA and Work-Study personnel in building their own database and/or spreadsheet applications**

7 years of experience creating ad hoc reports from FOCUS for IBM Mainframe, a major fourth-generation language, to:

- ◆ provide information from LMS
- ◆ interface information from LMS, FAM (Financial Aid Management system), SR (Student Records system), and/or the Housing database
- ◆ interface LMS data with PC applications, for various uses, via download
 - An application of this procedure retrieves over 6,000 possible candidate data records per run from LMS. These records are imported into MS Access. In MS Access they are formatted and subsequently uploaded to the National Student Loan Clearinghouse. The Clearinghouse then provides student loan deferment documentation. This process greatly reduces man-hours spent obtaining this documentation on an individual basis.
- ◆ assist other personnel in the Office of Scholarships and Student Aid and, occasionally, other campus offices in the creation of FOCUS ad hoc reports from various systems
- ◆ update data in LMS
 - **A major timesaving application** of this function occurred in the testing and upgrade of LMS to include new composite data fields for federally required reporting to NSLDS (the National Student Loan Database System). During collaborative testing by the NSLDS vendor, LMS vendor, AIS programmer, and me, I created and used FOCUS reports to isolate and analyze submission data that would not pass NSLDS edits due to programming errors or inadequacies. This information was passed to the appropriate vendors for software corrections. After the final software version was installed into production, I created FOCUS procedures to build composite data files that were uploaded into LMS to populate the new fields. This process saved not only months of work in gathering the data and entering it manually, but also eliminated countless errors which would have resulted from manual data entry.

OTHER RELATED EXPERIENCE

Designed and created the Loan Repayment Services website in 1997 which is comprised of over 70 pages. Currently maintain this site which is viewable at <http://loans.unc.edu>

Designed and created a webform which creates an ASCII data file of event pre-registrants for the Tarheel Sports Car Club. The file is downloaded into MS Excel saving the time and effort of manual registration.

Presented at the national and Carolinas Student Information Systems Users (SISU) conferences on the topics of:

- ◆ using FOCUS to enhance student loan collections and
- ◆ designing, creating, and implementing a website for a student loans office. Received Best Presenter Award for 1998 presentation.

Established and actively manage the LMS List which operates via the UNC-CH listserve software. This email list has a current membership of over 465 student loan collection personnel providing interaction regarding student loan regulations and collection procedures for approximately 200 schools and 15 organizations, including members of the U.S. Department of Education.

Assisted AIS (Administrative Information Services) programmers in the design and testing of the FAM (Financial Aid Management) FOCUS MFD (Master File Description) to provide the data extract for Stafford Loan information. Also provided the means to update several hundred existing FOCUS ad hoc reports with new data field names saving many hours of manual corrections.

Introduced OSSA (the Office of Scholarships and Student Aid) to email in 1992 and provided instructions and training on how to use email. Also, provided instructions and training on how to use TSO (Time Share Option, the MVS component for updating datasets) to edit email datasets to combine separate pieces of email and to upload and download files between the ATN (Academic Technology & Networks) MVS mainframe, where our email was housed, and our office PCs. This was very useful and timesaving information at that time since it occurred before OSSA could receive email in a Windows environment.

Was approached by AIS (Administrative Information Service) to present, to a group of AIS programmers, a demonstration of a complex MS Access database application I created for Loan Repayment Services to manage and balance daily and monthly collection and disbursement activities. Due to time constraints created by more pressing projects, this presentation has not yet taken place.

Attended supplemental training courses on the subjects of:

- ◆ Web design and implementation
- ◆ MS Access
- ◆ MS Excel
- ◆ MS WORD
- ◆ Lotus 1-2-3
- ◆ PC File management
- ◆ Visual Basic

AWARDS RECEIVED

1994 recipient of an **Information Technology Support Award**
from The University of North Carolina at Chapel Hill

REFERENCES

Bonnie Bechard, Assistant Director, Retired
Loan Repayment Services
The University of N. C. at Chapel Hill
(919) 967-4818

Curt Hardy, Applications Analyst
Programmer
Administrative Information Services
The University of N. C. at Chapel Hill
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Doug Crutchfield, Accountant
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