Present:  BSC, Dakota, DSU, LRSC, MASU, Misu, NDSCS, NDSU, UND, WSC, Campus Solutions-Angela and Marie

Absent:  VCSU, Deidre, and Kraig

Agenda Items:

- **Collection Module/Process** –
  - How do you take people out of the Collection Module?
    - The account balance has to be $0 so either the student pays or school writes off the amount owing
    - Another suggestion was to place an indicator of No Collection and just filter out those individuals
  - How do other campuses handle collections in regards to referring accounts to collections - do they write off the accounts immediately upon referring to a collection agency or wait?
    - Most of the campuses that spoke up do not write off accounts right away – they wait until a certain time has passed but that time varied amongst the campuses.  UND was going to share their write-off policies with other schools and NDSU is reviewing their current policy to wait longer before writing off to track progress of collection agencies, etc.
  - Why is there a “Dispute” listing?
    - There was not a clear understanding of why and consensus of the group was to remove it.
  - When does the aging category start?
    - The aging category is based on the due date of the charge on the student’s account.  Credit history needs to be processed prior so that placement of students in aging categories is correct.
  - Who can view the notes/comments placed on the account?
    - Anybody with security for the 3C’s can view comments that has the collection security role

- **Collection Benchmarking** –
  - Is there any way to track the performance of collectors for employee evaluations and how the collection process is working?
    - Suggestion was to use payment plans as a possible solution since nothing is in place at this time
    - Also suggested to pose this question to the HUEG listserv to see how campuses outside of ND are handling this.

- **Work Group to assign mass collection letters** – Angela has developed a work group consisting of those active in testing the collection modules - Mary (UND), Kim (NDSU), Danielle (MASU), and Amiee (NDSCS) to be able to mass assign the letters instead of the current process of one by one.  Another request for this group is to be able to mass update the student’s record that a letter was sent too.

- **Collaborative Process Reconciling** –
  - If changes are made to after the initial report, should campuses update the report or just go by emails sent?
    - Some campuses are updating and others are relying on email notifications
After discussion, it was agreed to only update the report thru the second day after the 100% drop of the term and rely on emails and bills sent between campuses to reconcile the charges.

**Payment Arrangements – PS Plans**
- Do other campuses use payment plans for students who are in collections and agree to pay in payments to clear the debt?
  - Seems no campus is currently doing that

**Financial Obligation Agreement**
- Angela reported that currently the DR is on hold until we figure out which way to move forward.
  - Option 1 – Before a student enrolls himself/herself, he/she would have to agree to the financial obligation before adding any classes. Concern amongst campuses is how to manually track the students that are not registering themselves, i.e. Dual Credit, Collaborative, etc.
  - Option 2 – Prior to Batch Term Activation, a hold preventing registration is placed on each account. The Financial Obligation Agreement becomes parts of the checklist that a student must do each semester before the hold is removed. Concerns for this option included the timeline for the hold to be removed and how do you satisfy students that do not use self-service.
  - After discussion, the agreed consensus was Option 2 – Once we receive the code to process this from the other campus, Angela will move the DR forward

**Update on Comm Gen Testing** – Angela asked for feedback of those that have been testing and it has been going well. Since it has been going well Angela ask that all letters be sent to Kraig by May 18th so that they can be placed in production by May 31st. A friendly reminder to all doing the letters – make sure the information is generic so that they do not have to be constantly updated, i.e. specific dates listed.

**Reports impacted by New Tree Node “DIST_ACCESS_FEES”** – Angela just wanted to update us that she is currently testing this in the development environment and discovered some reports will need to be modified to include the new node.

**Other**
- May is Mary’s last month for being chair – Ladona will take over in June with Crystal co-chairing
- Crystal will develop a spreadsheet for summer start dates, FA Disbursal Dates, and date of collaborative charges need to be by. All users are requested to email that information out.
  - Add to next month’s agenda – face-to-face meeting

**Development Requests:**
- Marie discussed the various DRs that have been completed, ones that are being working on, and the future ones they expected to work on.

Next Meeting: May 23, 2012
Next Minutes: Lake Region

Minutes respectfully submitted:
Janet Reisenauer
Dickinson State University