Present: BSC, DSU, LRSC, MASU, MISU, MISU-B, NDSCS, NDSU, UND, VCSU, WSC
Campus Solutions-Angela, Dee, Marie

General Agenda Items:

TouchNet:
Karin, Carrie and Dee attended the TouchNet Conference during the week of November 10th. After speaking to some TouchNet representatives, they were able to conclude that the basis for the problems we have been encountering with payment plans is that their program reads by account, not by item type. A discussion followed regarding how this difference in functionality may continue to cause problems with the TouchNet payment plan product for NDUS. Dee commented on the TouchNet teleconference that was held on Tuesday 11/18/08 in which Erik (from TouchNet) referenced an item type issue with VCSU’s student, when it was actually and item type for UND. Angela mentioned two campuses that made entries to the HEUG listserv that referenced the PeopleSoft delivered payment plans and stated that the advantages outweighed the disadvantages. Several others commented on the concern they have with the inability of TouchNet to find solutions to the issues that continue to arise during testing. It was pointed out that one advantage that the TouchNet product has over the PeopleSoft product is the ability for students to grant “guest” access to their account information through TouchNet. Janet mentioned that the Campus Community User Group is willing to look at creating a "guest role", but needs to know from Student Finance how we would want it to function. The general consensus was to have the guest role be able to inquire on the students account, have the ability to choose a payment plan and be able to select the "pay online" link through the students account in order to make a payment on the student's behalf. Janet said she would present this information at the next Campus Community User Group meeting on 12/10/08.

Since there is not a guaranteed date of when TouchNet will have an updated product that will be more compatible with PeopleSoft, it was decided to vote on whether to move forward with the TouchNet payment plan or with the improved 9.0 PeopleSoft payment plan. All 11 campuses voted unanimously to move forward with the PeopleSoft delivered product and to put TouchNet's on hold, with the possibility of revisiting their product in the future if an acceptable upgrade is produced. Dee will let Rich Lehm know of the group's decision and will get back to us regarding the next steps in moving forward with PeopleSoft’s product. Several campuses commented that it would be very helpful to meet in person to discuss the specific details of setting up the PeopleSoft payment plans in order to accurately implement them at each campus.

E-check payment credits via TouchNet:
Ann asked how other campuses process refunds to credit cards when the original payment was made through TouchNet. Angela stated that there is not a process in place for this to occur. Campuses should follow their own “in house” processes for refunding, whether it is by check, direct deposit, or by crediting the original credit card. A discussion followed regarding the correct procedures for issuing credit on credit cards, along with the legal issue of having credit card information on file at the campuses. It appears that campuses are getting conflicting information from the auditors as to what procedures they would like followed regarding refunds to credit cards.
1098T update:
Angela stated that testing has gone very well up to this point. She asks that all campuses submit any updates to the contact/address information for the individual campuses to her by 11/21/08.

The Self-Service option in the Student Center has not been thoroughly tested for proper functionality. Also, the student needs to give consent in order to use this Self-Service option and the limited time for consent to be given before January is an issue. For these reasons, Angela asks that we wait to roll out the Self-Service option until next year. All 11 campuses unanimously agreed to wait until the 2009 tax year.

Chelsea requested that the testing for this continues in order for the campuses to be able to utilize this for early registration this spring, which would be a good time for the students to give consent. Angela said that it may be available for spring, and that she will check to see whether or not student’s individual consent is good year after year and if it would work for multiple campuses.

Student Center-Account Summary Page:
Chelsea gave a summary of the new page that is being created that will have a more user friendly set-up for the students, parents and 3rd parties to view. It is still a work in progress, but this is what the sub-group has come up with so far. It will be a summary of the transactions that have occurred for the student in a given term by using the net amount of each item type. The student will be able to choose which term to view and the page will have up-to-date data. The item type summaries will be under the following categories: Charges, Financial Aid, Payment/Credits, Refunds, and Write-offs. These categories will include subtotals with a Term Total (net of all categories) on the bottom of the page.

After the Term Total, there will be an Anticipated Financial Aid data field for those students with anticipated aid that has not officially posted to their account; this will NOT show for students who do not have anticipated aid. This will also be the case for a student who has made a payment to a drawdown acct; there will be a data field regarding their payment, if applicable. The specific wording for these data fields is still being worked on.

There are some items the sub-group wanted to pose to the entire group for input before moving forward. They are:

1. What category should the waivers be under? After some discussion about putting the waivers under either Charges or Payment/Credits, All 11 campuses unanimously voted for the waivers to be under Charges.

2. Should the Financial Aid column show item types that net out to zero? If a student has aid and then, for a number of possible reasons, the aid is backed out, would there be a benefit for the students to see the line item of the item type (ex. Pell Grant) with a zero net amount? The benefit would be that the student, parent and/or 3rd party would be able to see that “something” occurred with the aid and could then look at other financial aid links within the Student Center in order to find out what occurred. It was stated that, in order to keep this summary page “clean”, there should not be line items for items types with a net zero amount in any other category other than Financial Aid. All 11 campuses unanimously voted to have all applicable item types show under the Financial Aid category for a student, even if the net amount is zero.

3. Should there be a column for the account type associated with the item type under the Charges category? Chelsea stated that this would help students realize what charges they would need to pay by certain dates (ex, UND had different due dates for different charges). After some discussion about whether or not this information would make the page cluttered, all 11 campuses unanimously voted to have a column with the account type within the charges category.
**Refund Reversals:**
There has been concern as to the processes of reversing refunds and where one should begin when trouble-shooting errors in refunding. Many feel that they are a bother to Dee and Angela due to contacting them whenever an issue arises or to have them check which process the “problem check(s)” got stuck in. Dee mentioned that she uses a report she created that shows her this valuable information and it was asked if all campuses could have access to this report. Due to security reasons, Angela will need to look into this further before it would be made available to all.

Karin supplied a print-screen that referenced a step NDSU uses in order to verify if the check reversal process was successful:
Set Up HRMS-Payroll for North America-Payroll Processing Controls-Pay Calendar Table: in the “pay period begin date” field, put the date that the original check was issued. If the box “Off-Cycle Cals Outstanding” is **checked**, you have other steps to complete before moving forward with more refunds and if it is **unchecked**, you can continue processing refunds.

BSC and VCSU were sharing with the group some of the processes their campuses follow for refunds, and this raised questions as to what is the correct process for each situation. Are there some steps that are not necessary to perform (which would save time) and the end result would still be accurate? Mary and Ann will send in examples of reversals that have been processed, along with the refund procedures that were followed to Angela and Dee so they can compare apples to apples. They will get back to us with the results.

**Other:**
Janet stated that Campus Community is working on the Notify button. One of the questions is how the email selection would work (preferred, campus, etc.).

ND HEUG is March 16th and 17th in Fargo. The ND HEUG committee is looking for topics, so please submit any suggestions to Chelsea and she will forward them to the committee. The National HEUG conference is March 22nd to March 25th in Anaheim CA.

**Development Requests:**
The following DR’s were prioritized by the group with 11 campuses unanimously in agreement:
1. Removing the dollar amounts from the service indicator on the credit history process.
2. Under Student Center-after choosing the Account Inquiry link, have the current term set as the default term under each applicable tab.
3. Add fund # column to query 112
4. Add instance column to query 46

Karin will submit DR’s for the items listed on the agenda.

Chelsea will submit a DR for developing into production the query Dee created for finding outstanding refund issues.