SF User Group Meeting  
March 24, 2010  
Submitted by VCSU

Attending: BSC, DCB, DSU, LRSC, MASU, MISU, NDSCS, NDSU, UND, VCSU, WSC, Angela, Dee, Marie, Kraig

Opened the meeting by thanking Chelsea for accepting her new role as our SF lead.

Jennifer Kunz, CS Director, was present for a portion of the meeting. She will attend our meetings as often as possible. Welcome to Jennifer & congrats on the new position.

1. **Alliance Conference** – Presentations from the conference are available on the website heug.org. Angela encourages everyone to sign up to be a member. When a member you can view issues, resolution, and presentations. A few topics she mentioned were 1) payment applier- it is strongly recommended not to “reset ID’s” when running this process 2) dropping a class online in a “what if scenario”. This is interesting as it shows students the impact prior to actually doing the drop. 3) Item type security-this can be done at the item type level & user would only be able to view those certain item types.

2. **Bundle 16** – Notes will be released on CND site. Some undocumented issues are 1) extra/new process (EIP) on group post. This will be removed tonight. 2) Case has been submitted with PS..in cashiering when adding a target and select charge to pay the + and – buttons disappear. Dee is working on this. 3) Kim at NDSU found that GL charges are pulling differently. Further testing will be done on this.

3. **Proposed Credit History Process Change** – Angela reported that University of Minnesota runs the credit history process nightly and it takes only approximately 15 minutes. Some of our campuses can run up to 5-6 hours. They use the radio button “last activity date” and run using the date 2 days prior. This is a very large table. Chelsea questioned how it would apply and remove the service indicator when the student becomes 30 days past due and has no activity. Angela will propose this question to Carolee at UM. Note: email response to this was sent to list serve by Angela (3/24/10 @ 11:48am). Karin recalls this discussion early on and that it would come to this. Angela would like campuses to test in STG, modify run control, to see if we can change our processes. Angela later reported that UM runs the option all ID’s on weekends (Sat. or Sun.) and last activity date for all students nightly Monday-Friday with the 2 days back set in the date field.

4. **Direct Lending** – Dennis is preparing, so if it does go through we know who to contact. It was asked who does the drawdown of G funds on each campus. It will affect grants and loan draw downs. A meeting will need to be set up with these individual to work on reconciliation at each campus. The impact will be mostly volume.

5. **1098T Submission** – Marie reported that it is due to IRS by end of March. She plans to run the report Thurs., March 25. Prior to the run she will look for any corrections or negative amounts. If there are any modifications she’ll notify the school. Two more submissions are possible for any corrections or new originals.

6. **TouchNet PCI Assessment Survey** – Schools should be receiving survey from BND by April 1. They are due back May 15. TouchNet should be completed by end of March. Dee sent email with this info.

7. **Refund Reversals** – There have been problems with the process of reversing refunds through the payroll side. The confirmation process doesn’t always complete successfully. Then one has to unsheet the reversed paysheet which, also, hasn’t always completed correctly. Would like campuses to test in STG the reversing of a refund on the student side. A couple of campuses are currently processing this way with little problem. Dee will send out email.
8. NDU Outstanding Tuition & Fee Report – UND uses this for verification of enrollment. If there isn’t any active address it will not return student name. Can the address field be removed? Some universities are using this report for collection and like the address to stay. Marie can modify to return a blank field if there isn’t an active one. Chelsea will do ticket for Marie to fix the report.

9. Pay Online link under Student Center – Discussion on ebills verses view account; statement amounts always change and believe it might be confusing. Should the email message that goes to students after ebills be changed? Dee will pull the information and inform us what can be changed. Mary suggested that the view statements be eliminated and continue with pay online now. Chelsea suggests to rename link “pay online now” and locate both under campus finance and student center. Angela will work with Gar on this. Can we direct them to look at account summary by term when ready. Chelsea will send copy for campuses to review. The original group working on account summary will then review before development. Marie reported that the issue on accounts that don’t balance by term can’t be resolved.

10. DDP Forms Purge – Discussion on how campuses are handling the inactive DDP forms. Some are shredding, they are treating as sensitive data and a PCI compliance issue. If we follow state records retention policy, they would be kept 10 years. This is what payroll does. If policy were to be changed it would take 1 to 1 ½ years. How does records retention refer to this and what category does this fall under? Some schools are putting in 3 ring binders in locked vault. The AP process is current year + 4, one school is following this. The purge report is already 2 years inactive, then would keep another 2 years and could be purged. This wouldn’t be true for those that inactivate their own.

11. Application Fees – How does each campus process. UND is looking to make a change. They are doing department receipts. NDSU posts to student accounts and not GL (same as UND) and have now changed to post to GL. Chelsea & Karin will talk. BSC calculates and posts to student accounts. There was discussion on deferred payments for application fees.

12. Development Requests – Marie went through the spreadsheet. Karin would like query of balances by item type. She will do ticket and propose at next meeting. Mary would like a report that pulls information on drops. Angela referred her to Finance query 53. Ladonna reported issues with the report. Dennis came & talked about this query, the problem was corrected and is now in production. This should, also, include loans; Dennis will look at SQL on that. Timing is believed to be part of the issue on any refunds that would be given students. Could a field “anyone who dropped below fulltime & has FA” be added to the refund enrollment report? Marie will look into this.

13. Higher One queries – UND is using Higher One, BSC will be, and NDSU is looking into it. It is not known yet how much support and at what level will be given, a lot is hard coded. Chelsea listed a number of positive reasons of why they are using Higher One.

14. Student Groups – UND is looking at using for different rates. Are others using & how is it working? They’d like to put students into the groups in their office. BSC uses for extra fees on certain students. WSC and MiSU are, also, using and it is working well for them. We do have security, but not to setup, will have to go through access officer.

15. CC User Group update – Janet & LaDonna were gone. The following two items were tabled 1) request to add additional information to various PS screens 2) adding phone history on the student information. The items will be talked about at the next CC meeting.

Meeting Adjourned at 11:30 am
Next Meeting: April 28, 2010