Attendees: Bismarck, Dickinson, Lake Region, Mayville, Minot, Dakota College, NDSCS, NDSU, UND, VCSU, Williston
Campus Solutions – Angela O’Leary, Dee Muir, Marie Lindstrom, Kraig Ronning

General Agenda Items:

1) TouchNet COMTEC report - Dee presented highlights from the COMTEC conference regarding the new 6.0 release coming:
   • There will be a new student interface in Bill+Payment Suite.
   • The UCommerce Dashboard will be secured by institution.
   • There will be more customizations available.
   • Mobile app will be available (however there may be difficulties with students connecting to TouchNet through PeopleSoft).
   • Version 6.0 will be released in the first quarter of 2011 and NDUS institutions would upgrade a few months later.
   • VISA debit cards will be accepted by PayPath.
   • 1098-Ts can be available on TouchNet so that authorized users can access them. However, students will need to give the authorization for this item.
   • In Marketplace the sales tax accounting codes will be by merchant and store but there will still only be one default tax rate and one higher tax rate.
   • There will be an option to set up the ability for students to pay by line item.
   • Dee emailed a summary of the conference to the TouchNet listserv on November 18th.

   - Added agenda item: The processing errors reported from 11/23 have been figured out.

2) Existence of delivered Account Summary report – Angela led the discussion on how the institutions want to proceed with the delivered Account Summary page now that the new NDU Account Summary page has been developed.
   • NDSU and BSC stated they would like to have the page removed since it has inaccuracies and would require additional maintenance.
   • It was decided to remove the delivered Account Summary page from view.
   • This topic will be revisited at a spring SF User group meeting to determine if there are further adjustments needed to the new NDU Account Summary page.
   • Mary will submit a request to have the delivered Account Summary page removed.
3) 1098T work committee – discussion of the 1098T processing led by Angela:
   - The SSNs are masked in the online and printed 1098T forms, but not in the “Audit and Validate 1098-T” report.
   - Mary, Chelsea and Crystal agreed to be on the committee to test the 1098-Ts. The deadline for the committee’s testing is 12/10. Testing will open to the remaining institutions on 12/13.
   - Karin will test new financial aid item type groups for NDSU’s 1098-T processing which will exclude athletic housing scholarships.
   - Angela will turn on the consent authorization for new students. This is currently only functioning for students who were in attendance in 2009 and earlier. Angela will also check into turning on the consent for future tax years.

4) Marketplace Privacy Policy – discussion let by Dee:
   - The privacy policy has been loaded by TouchNet and is available for U-Stores.
   - Each U-Pay site has their own privacy policy.
   - This is not an actual NDUS policy so the wording will be changed to “Marketplace Privacy Statement”.

5) Query FA_0053 – Post Census Class Load Change – led by Angela:
   - This query is for Perkins reconciliation
   - UND has developed their own query in the Reporting environment.
   - Query 53 and UND’s query could both be used as a basis for writing a new query to reconcile Perkins
   - Mary Anderson will be contacting SLSC to find out how SLSC obtains their information regarding students’ Perkins loans.

6) Waiver Analysis Report – Collaborative issue discussed by Janet:
   - Waivers are paying both regular tuition and collaborative charges when doing student or group posts of waivers.
   - Angela will be setting up a new node in the Item Security Tree for collaborative charges for people to test in stage.
   - Everybody is to send their collaborative item types to Angela. Angela will then send an email by 11/30 with a suggested item type range.
   - A conference call will be held on 12/1 at 9:00 AM to discuss this topic.

7) Spring Tuition Calc Dates – led by Angela:
   - Institutions that haven’t started the batch tuition calculation for term 1130 should submit a ticket for the first time calculation.
8) Residency code request – led by Chelsea (Addendum A attached)
   - Chelsea has requested to have a new residency code established for WICHE graduate students accepted into specialized programs.
   - UND has seven programs affected by this circumstance where the students accepted through the WICHE program receive the ND graduate tuition rate rather than the 150% WICHE rate.
   - UND reported that NDSU also has one program affected by this but NDSU was not aware of this.
   - It was decided that Angela would talk to Jennifer Kuntz to determine if this should be mandated by NDUS instead of voted on by user groups.

9) Collection report workgroup – led by Angela:
   - This work group will be meeting on December 10th in Fargo at Skills & Technology.
   - If institutions want something specifically addressed they should email somebody from the workgroup: Aimee, Chelsea, Kim, Ann, Angela, Dee, Marie and Kraig.

10) Campus Community request: Student’s “home” campus – led by Angela:
    - The discussion was about how institutions determine which institution is the home campus for the student.
    - If home institution is where the student is degree seeking.

11) Campus Community Update – led by Janet:
    - New item: For students whose residency is changing to ND, then there is a reason coded that needs to be added for why the student is receiving ND residency.
    - There are new rules for being on the Campus Community group

Development Requests:

1) International SF Report – request from UND Payroll to include app fees:
   - An optional drop-down was approved to be included in the query for the application fees.

2) 1098-T request to show consent to student:
   - Karin is requesting the 1098-T page show a statement that the student has consented.
   - Karin will email out recommended wording to obtain approval to move forward with a development request.
3) Invoices:
   - Kraig will send out a template invoice to see if it fits in the schools’ envelopes with the new font size.
   - Kraig will also work with the statements to include each institution’s logo and address.

4) EmplID carryover from Customer Acct to Acct Summary:
   - Kraig is researching creating a link on the Customer Accounts page to the NDU Account Summary page. Kraig is unsure if the student’s ID will need to be re-entered after clicking on the link.
   - The users agreed that we would like to have the old Account Summary link replaced with a link to the new NDU Account Summary page.

5) Other changes to the new NDU Account Summary page:
   - The students currently have a drop down to select a term and after viewing the term, the student needs to go back to select a new ter. Chelsea is wondering if the students can have the “Next in List” functionality the same as the SF Users.
   - Chelsea is also requesting that the term balance be displayed on the list of terms.
   - These questions will be researched to see if they are viable options.

6) Perkins query:
   - This item was not discussed further due to time constraints and the topic was discussed in the General Agenda Item #5 above.

7) Current DR Listing: The DRs were prioritized on Addendum B.

Next Meeting: December 22, 2010

Next Minutes: UND
Addendum A

Date: November 22, 2010

To: Student User Groups

From: University of North Dakota

Subject: Creation of new residency code

Background:

The Western Interstate Commission for Higher Education (WICHE) offers two programs:

1. WUE – Western Undergraduate Exchange – Undergrad students from the WICHE states receive tuition at 150% of institution’s resident rate
2. WRGP – Western Regional Graduate Program – Graduate students from WICHE states in approved graduate programs receive institution’s resident rate

The State of North Dakota has agreed to participate with WICHE in these programs in order to build enrollment and provide student diversity across our campuses.

Undergraduate students applying from the WICHE states receive a residency code of “WUE” which automatically bills them at the WUE rate. However, there is no corresponding “WRGP” residency code for graduate students who apply for enrollment within approved WRGP programs.

Benefits of a “WRGP” residency code:

1. Prevent Student Finance from processing tuition overrides in order to bill these students correctly
2. Allow Financial Aid to auto-package based on residency
3. Provide a Graduate residency code that corresponds with current WUE code
4. Provide more accurate residency reporting

UND would appreciate each user group’s consideration and vote on this matter so that we can forward the request to Campus Solutions. Thank you!
## Addendum B

### Student Financials Development DRs, Tickets and Issues as of 11/19/2010

<table>
<thead>
<tr>
<th>DR Number</th>
<th>Request Description</th>
<th>Priority</th>
<th>Status</th>
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<tbody>
<tr>
<td>NDU_0126_SF_2</td>
<td>Aging Report to add optional Id Type prompt</td>
<td>10/11</td>
<td>Production</td>
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<tr>
<td>NDU_SF_0147</td>
<td>NDU Account Summary by Term Bolt-on</td>
<td>11/1</td>
<td>Production</td>
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<tr>
<td>NDU_SF_0175_2</td>
<td>Course and Class Fee Audit Report - exclude wait listed students</td>
<td>11/1</td>
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<tr>
<td>NDU_SF_0187</td>
<td>Departmental Paid Charges by Fund Report</td>
<td>11/1</td>
<td>Production</td>
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<tr>
<td>NDU_SF_0181</td>
<td>Third Party Balance Report</td>
<td>11/1</td>
<td>Production</td>
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<td>NDU_SF_0191</td>
<td>Create Job Data Runcontrol mod to delete rows</td>
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<tr>
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<td>Tuition Calc Flag Removal Runcontrol to delete rows</td>
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<td>Production</td>
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<tr>
<td>NDU_SF_0185</td>
<td>Tuition Charges by Location mod for drops and dual careers</td>
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<td>SF Accounting Line Extract SQR</td>
<td>11/8</td>
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<td>NDU_SF_0192</td>
<td>Term Fee Setup Track Class Price mod</td>
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<td>Add Name and Empid to Pages</td>
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### Other Issues
- Karin request for application fees on International SF Report - User group to discuss

### Tickets
- Pat Hanson request for application fees on International SF Report

### No DRs
- **mentioned at meetings but no DRs submitted/approved**
  - Billing Statement - mod address size font
  - Query 86 - add timing column
  - Item SF search by reference number
  - Perkins queries
  - Collections Report
  - 1098-T Self Service consent mod

- Karin
- Marie, Kim
- Marie, Chelsea
- work team meeting 12/10