SF User Group  
Meeting Minutes – Submitted by UND  
December 22, 2010

Attendees: BSC, Bottineau, Dickinson, Lake Region, Mayville, Minot, NDSCS, NDSU, UND, VCSU, Williston  
Campus Solutions – Angela O’Leary, Dee Muir, Marie Lindstrom, Kraig Ronning, Jennifer Kunz  
Finance & HRMS – Teri Thorsen

Agenda:  

1) Scholarship payments through AP  

Teri Thorsen discussed the Public Reporting Database which has been called for by the Legislature to provide the public with access to the state’s financial information. The database is due to go live by 6/30/11, but they plan to open up earlier. OMB has the responsibility to deliver and is consulting with NDUS. Currently, NDUS is reviewing for breaches of confidentiality for private data. They have discovered questionable payments thru AP – paid to individuals – coded to 661xxx – some are large amounts. This would be a breach of FERPA if they are truly scholarship payments to individuals. The database goes back to 2007, and many schools have been found with these payments.  

This impacts SF because manual adjustments to 1098T’s are required.  

Lisa reported that UND has recently found AP payments to students for fellowships, stipends, and scholarships that are to be paid in installments rather than in a lump payment for the term. These have been running thru AP because Financial Aid cannot accommodate recurring payments. The info is not getting to 1098T’s nor picked up for taxes for non-US citizens. Lisa confirmed that this is confidential info and all should go thru Financial Aid, not thru Payroll or AP. Lisa is submitting a proposal to UND Financial Aid for discussion. UND has discussed with Financial Aid already – FA is concerned with the extra work involved to disburse monthly due to adjusting budget amounts and changing placeholder amounts.  

NDSU has been paying monthly amounts for athletic scholarships for room and board using a work-around.  

Angela will discuss with Dennis as he may have ideas for a solution within Financial Aid.  

Questions:  

-Is Payroll data private?  

-How can this data be excluded from the database since it occurred in the past? Teri – suggested masking specific account codes or vendor codes, but they are not all coded the same. Still trying to determine solution.
- Are valid AP payments made to students such as student travel/prizes/other payments also confidential? Teri will research.

Teri suggested coding payments to a vendor type of “E” so that they can be excluded by vendor type.

2) Identity Management Update

Jennifer Kunz reported on the new Active Directory and requested that staff and faculty start using new ID = firstname.lastname. Old user ID’s will be retired in Feb (2/12?). Run control changes will not be carried over. Recurrences will need to be canceled out of old and resubmitted under new user ID. More guidance will be coming soon. Students will get their user ID’s as soon as their app is accepted. Continue to use old ID’s for both STG and Query. More guidance to come later. Use new ID for HRMS and Finance as well.

3) Other Campus Solutions Update

Jennifer reminded everyone of the development freeze 1/5-1/15 and to avoid running the processes that consume a lot of system resources during the busy times.

4) 1098T’s
a. Chelsea notified the group of Federal regulations which require reporting of students with invalid SSN’s. Angela mentioned that since it is a federal requirement, Oracle should provide a solution. Dee will take the issue to the PAG at HEUG. For now, each institution will need to override the students without SSN’s in order to include them on the IRS file and print a form. The regs do not require reporting of non-resident aliens. Angela suggested using some setup on the 2nd tab of the TIN setup page to look at citizenship. The tab is not available to campus users. Query NDU_0041_SF selects all students who have USA on the citizenship table and all 9’s for SSN. May be helpful to have it display the citizenship code description.

It was suggested that the SSN be required on the common app. In the past, Pat Seaworth has noted that would not be allowed. UND is pursuing internally to get support for requiring it.

b. Review Self-Service Agreement screen - Chelsea was made aware of this from an Oracle webinar regarding the 1098T grant consent agreement; however, it is not secured by institution, so we currently do not have access to it. Angela will send a screenshot. It shows the student’s ID, name, details of the agreement text and number, and date consented. Once users view the screenshot, we can determine whether we want to pursue having it secured for viewing.

Group voted to have the self-service grant consent verbiage moved to Production. It will be migrated tonight.
c. Schedule Generate process 1098T – Angela requested each school send an email to the listserv of date and time they each plan to run the Generate 1098T process. She reminded users that it could be scheduled and that she could assist, if needed.

Marie confirmed that all other modifications to 2010 1098T’s could be moved to Production. They will be migrated on Monday, 12/27.

5) Collections Workgroup - Ann reported that the group is working on modifications to the collection module screens and reports. It was determined that the workgroup would meet again to discuss which fields should be included on the collections report based on the data collected already from each school.

6) Collaborative Report – The group determined that the collaborative tuition and other charge information would be entered by campuses the day after the 100% refund date, January 21. Karin compiled a list of each school’s financial aid disbursement dates. Provider campuses are to ensure that they have entered their collaborative information for each Home campus in time for the Home campus’ FA disbursement. There is concern about the tight timeline. Minot is also concerned because they will not receive their Barnes & Noble charges until the afternoon of 1/21. LaDona agreed to try to enter all other information first and note to the campuses that bookstore charges would be on later.

Jennifer mentioned that a Collaborative Workgroup has been established by Laura Glatt to look for efficiencies. Joanne Kitchens and Mary Eisenbraun are on the committee along with representatives from FA and Records. Campuses should bring issues to these members so they can take the Student Finance concerns to the committee. The group has met once so far, and the next meeting has not yet been scheduled. Angela requested that a reminder go to the SF listserv shortly before the next meeting. It was also suggested that each campus sign up for the Collaborative listserv in order to stay informed.

7) Development Requests

Kraig needs a DR drafted so that he can put the invoice modifications into place for user testing. The following items have been requested:

   a) Add logo
   b) Enlarge mailing address
   c) Remove “billing statement” header
   d) Remove school name
   e) Remove credit card information (can be done on an individual campus basis) – Mary E. reminded campuses to consider the PCI implications of continuing to keep the credit card section
f) Underlines – make solid rather than dashed  
g) Move customer ID, statement date, and print date to right to make room for logo  
h) Consider increasing font size – could result in 2-page statements  

Next Month:  
- Return of Title IV Funds  
- Development Requests – top of agenda  
- Minutes assigned to Valley City