SF User Group Meeting  
March 29, 2011  
9:00-11:00 CDT

Call: 701-777-5900  
Access Code: 135092# - Please note change

Members present: BSC, DCB, DSU, MiSU, LRSC, MaSU, NDSCS, NDSU, UND, VCSU, WSC, Angela, Jennifer, Marie

Development Requests:

1. Review of items from last meeting (Marie):  
   a. Reference Number Search Query – NDU_SF_0203 approved  
      i. There was a group that met and designed how it should look. It has been approved and is now on the DR list.
   b. Deposits by tender category for month report – NDU-0125_SF approved  
      i. This has been recommended for the campuses to use this query.
   c. Student Group Information Request  
      i. NDU Aging Report mod to add optional student group NDU_0126_SF_3  
         a. Added the parameter and the DR is waiting approval
      ii. Mass Contract Select by student group – research  
         a. This would help with assigning students in 3rd party contracts. More research will be done on this DR.
      iii. Audit tracking of Item Type set up – NDU_SF_0204 approved  
         a. This will be brought into production today if there are no issues. Users can see who has updated that item type.
   d. DDP Inactivation process mod – NDU_0157_SF_2 completed

2. DR list review – (Marie and Kraig)  
   a. E-bills will be loaded from Sophie on Friday into STG for testing. Dee and Angela will email out to let campuses know when this is completed.
   b. Collections process modifications are being worked on by Kraig. Hope to roll out for user testing around 3rd week in April.
   c. Will be approved (need to be prioritized): collection agency extract report, reference number wild card search, modification to aging report, correction to Query 164, modification to the Query 124, UND request: aviation upload modification
   d. Approved to proceed with the collection agency extract report as the top priority. Start practicing with the collections module by using the manual that Angela sent out.

3. 1098-T update – (Marie)  
   a. File created Thursday March 24  
      i. Transmittal file was accepted. Marie sent an email to explain how to do corrections. Another note will be sent in mid-May to send another file.  
         If you have questions, please contact Marie or Angela.
   b. Caution about running Generation process
i. Make sure you do not run for all students. User the student override instead. Otherwise, it will modify all the students that had invalid social security numbers. Angela will update the manual for next year.

4. **New Requests?**

**General Agenda Items:**

1. **User Group leadership selection – Chelsea**
   a. The proposal was attached to our minutes. We are looking at using a chair and co-chair rotation effective July 2011. It was suggested and approved that the chair beginning in July would vice chair t until July when the new chair would take over. Chairs duties include putting the agenda together, leading the meeting, etc. Chair and Vice Chair campuses will be exempt from minutes. BSC will be the chair starting in July 2011 and MISO will be the vice chair. The schedule will be updated. Angela will put the schedule on the ConnectND site.

2. **Collaborative committee – Janet**
   a. Issues that the collaborative committee distinguished were sent out to the user group. Janet asked for the group to look over the issues to see if there are any adjustments or additions to the proposal. Chelsea asked that we emphasize that the automation process discussed in issue #1 be workable and help the collaborative process. One concern addressed was the tuition being calced at the other campuses before the report is run. Committee members will be attending the collaborative process meeting in April in Bismarck to discuss these issues that affect Student Finance in this process. Karin from NDSU would like the change to the process so that all campuses can approve it first. Janet from DSU suggested that all the modules involved being able to see the new process and make suggestions before approval. LaDona from MiSU suggested that all campuses review the issues and resolutions and add any modifications to the proposal. The Collaborative committee will meet next Tuesday to discuss any campuses suggestions. Campuses should send questions/suggestions to Janet before then.

3. **Audit tracking of residency screen changes – Chelsea**
   a. Chelsea suggested that an audit tracking change be made with the residency page. This would be beneficial because it would show the history of the residency for a student. BSC and WSC gave their support for the DR. Angela suggested that the justification for the DR be to assist with follow up training for users.

4. **Updates to NDUS DDP form – Ann**
   a. It was suggested that a note be on the NDUS DDP form that the DDP is only for the Student Finance not for Human Resources or Accounts Payable. Other schools have modified the general form for their own use. Chelsea suggested for campuses to make any modifications to the form that the campus needs and use it for their own use.
5. **Reverse write-off – hard-code date – Chelsea**
   a. Angela updated Marie on this issue. Chelsea will submit a ticket with a screen shot to adjust the screen for both students and corporate write offs.

6. **Self-service message when student attempts to drop class after 100% refund period - Chelsea**
   a. Chelsea suggested that a warning pop up stating that a student dropping a course after 100% will not be getting a refund for the course. This is an issue with more than just NDUS campuses. Mary from BSC said there is an issue with students attempting to drop their last course and not understanding the message stating that they cannot drop their last course. The message says, “You cannot drop your last class. Please contact your Registrar’s Office.” Chelsea will send out suggested verbiage to use for the dropped class message for the group to agree upon before requesting a modification to the process through the Records Group.

7. **Refund Balance report – add terms – Chelsea**
   a. Chelsea suggested that the Refund Balance report be broken down by term. This would help so the users do not have to look up the student’s account each time there is an issue with applying aid from prior aid years. This will be put at the bottom of the DR list as an issue to review at a later time.

8. **Turning off Campus Finance links in Self-Service – Chelsea/Dee**
   a. This will be discussed at our next meeting when Dee is back from Alliance.

9. **Campus Community update – Janet/LaDonna**
   a. Residency: coding for residency descriptions will be written up by a smaller committee and process that should be followed for residency. Chelsea and Mary will be working with records and admissions personnel to write up the process.
   b. Graduate programs: a discussion about graduate programs that would be collaborative. This will possibly be discussed in more detail at the Collaborative meeting in April. Karin will be writing up reasons why the collaborative process should not be used for these types of programs.
   c. Minnesota Reciprocity: a report was generated of students that were rejected because of invalid social security numbers and/or high school is not in Minnesota. Mary Bergstrom is working on a modification to the report that is sent to Minnesota and will send an update once that is ready.

10. **Campus Community position**
a. Janet asked if anyone would want to be on the Campus Community user group and she would step down. Crystal from WSC will be the new representative on the committee.

Other:
Karin from NDSU
   a: Query 64-modification to display item type and description. Karin will email out information for campuses to take a look at.

Angela
   a: Tickets have been coming in to update fields in item types. It will now look at all historical rows. Marie and Kraig will get a list of all item types with missing fields and Angela is working on updating the fields so that the errors are no longer an issue.

Jennifer Kunz
   a: Announced that she is resigning and that April 12 will be her last day. Assistant Campus Solutions Director Tom McNaughton (sp?) will be starting next week, and Campus Solutions will be hiring to fill Jennifer’s position.

Next Meeting: April 27, 2011
Next Minutes: Bismarck