Minutes assigned to: Dakota College

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

General Agenda Items:

1. **Alliance Conference Update – Dee**
   - Dee encouraged everyone to go out and vote on student finance issues.
   - There will be upcoming self-service enhancements. More educational opportunities, i.e. more webinars.
   - They will be releasing a community source site.
   - They will continue with the schedule of 4 bundles per year.
   - E-bill is working well. Texting capability, which we could possibly use in the future, is available but our campuses are not set up for this usage at the current time.
   - Splitting HCM and Campus Solutions. Tax issues will not be updated after 2014.
   - One school mentioned that they have a 1098T-Frequently Asked Questions website. This decreases the amount of phone calls they receive with questions.
   - **PEOPLE TOOLS UPDATE:** This is a more dynamic user interface with on-page help and on-page menus.
   - Campus Solutions Mobile: There are mobile phones and mobile apps. Looking into integrating with TouchNet. Timeframe of 2-5 years when it will be released.
   - Attended a GL Recon presentation by U of MN. They send every item type to the GL.

2. **HEUG Online Course/HEUG Website-Mary**
   - Mary encouraged everyone to become a member. An email was recently sent out by Angela regarding the upcoming May education series schedule. This website has important information and upcoming meetings.

3. **Financial Agreement – Angela**
   - Marie & Angela attended an Administrative Affairs meeting. Research needs to be done as the enhancements will be collaborative. Approval has been given. A mid-sized project will take a few months to be implemented. Further details on this are listed on the HEUG website, 2nd page.
4. **IHC Screens in STG (International Health Charge) – Angela**
   - UND has stated an interest in this screen. Angela has worked with Security to have this placed in stage for those with a super user role. Please check to see if this will benefit your campus.

5. **Data Dictionary Elements- Status Update – Angela**
   - Angela & Dee will start working on 2nd set of elements. Ladona, Kelly, and Mary have participated in meetings providing feedback on dictionary elements.
   - This project is a work in progress for a long time. Please make further suggestions and comments on the Wiki.

6. **Bundle 21- Angela**
   - This will not affect Student Finance very much but mainly Financial Aid. This is an area that Dee tests. Testing will be done for the refunding basis and calculation basis.

7. **People Tools Upgrade-scheduled processes – Angela**
   - This will be an upgrade to 8.51. This is a big project that Dennis has been working on and providing information to us. We need to start talking about scheduled processes. We may need to reschedule processes after the upgrade.
   - This is tentatively scheduled for June 10th. They will keep us posted on the dates.
   - Angela stated that she appreciated SF user testing in stage when requested to do so and continues to request this testing in a timely manner to prevent a migration freeze due to the upgrades.

8. **Service Indicator Prompts-Aging – UND**
   - NDU Aging Report. Currently there are only 2 service indicators and UND would like more. This report could be modified. UND currently has a need for 8 service indicator options. With no opposition, permission was given for Chelsea to submit the service/development request for modification.

9. **Campus Community Update – LaDona/Janet or Chelsea?**
   - There are no new updates since the last meeting. Crystal took Janet’s place on the committee. They will be meeting this Thursday.

10. **Collaborative Meeting Update- Janet/LaDona/Crystal/Mary**
    - A meeting was held last Tuesday and Wednesday. A lot was accomplished. Angela questioned the timing of everything... re: possible resolutions for the same refund date and the same disbursement date at all campuses. She questioned, “Is this something that schools need to be refunding and disbursing at the same time or one or the other”? LaDona stated that there would be a deadline that everything would be processed on the report. After that financial aid and disbursement could be at any time. An agreement by the collaborative
committee was made that at the end of the 2\textsuperscript{nd} work day after the 100\% refund period that all information had to be loaded into the report so the campuses could run it.

- Angela then asked for responses regarding refunding. UND will probably be impacted. LaDonna stated that this was the only thing that we could really do. A question was raised regarding performance issues with many schools refunding at the same time. The option of having an automated report would take one to two years to get.
- Mary encouraged everyone to go through the items that were emailed today regarding collaborative paperwork so further information can be given to the collaborative committee. Further discussion was made that 11 campuses would need to have all information and that two days is not enough time. Any changes need to be given to this committee so send your concerns. Currently this will be a procedure and will then go to policy.

11. Collaborative- Graduate Programs?
- Information has not been received yet from Karin. NDSU will notify her and will get back to us with concerns for the graduate program.

12. Turning Off Campus Finance Links-Chelsea/Dee (Carryover from previous Agenda)
- A request has been made to hide a couple of the links. Dee will work with Chelsea. They will make a proposal to the SF group and suggest a DR request.

13. Residency Committee- Mary/Chelsea
- They have not met since our last SF meeting. No new update to report. LaDonna states that MN is supposed to be coded MHEC instead of nonresident.

14. Update of email for List Serves- Mary
- Angela will check into where and how individuals can update their change in email addresses to list serve groups.
- Dee owns the TouchNet list serve. She will update those.

15. Query request for non-ACH refunds- NDSU
- Kelly requests this query to show students who have not enrolled for direct deposit or have no current activation for direct deposit. They would then place an SF7 hold their account to prevent the check from printing and contact them. This would prevent a paper check from printing. This would delay the distribution of printed checks and this would prompt more students for direct deposit.
- No query is currently available to identify direct deposit on the SF side.
- Committee agreed that NDSU may submit the request.
- Query could also have a prompt for “active” and “inactive.” This would provide further information to sort.
- Workgroup will consist of Kelly and Marie. They will contact Dee.
Additional Items for Discussion:

16. Global Service Indicator—Crystal
- Discussion was held at the collaborative meeting regarding the possible need for a global service indicator. Mary Bergstrom stated that this would affect and prevent students who are transferring to other schools when they owe money at the current school.
- Concerns or thoughts on this should be sent to Mary at BSC. Mary Bergstrom will be checking into this for more info. This would prevent students from going to another school and creating a bad debt.

17. Student Finance 2-Day Meeting/Retreat—Crystal
- Would there be an interest to have a 2-day meeting in Bismarck this summer? The last Face-to-Face meeting was held in October per Angela. This will be added to the agenda for the next monthly meeting.

Development Requests - Marie/Kraig

See Attachment

- Invoice modifications. This is completed. Invoices are beautiful. Everyone is happy that this is completed. Other departments also appreciate this on the campuses.
- Item type audit records. This is in production. Angela will help with this query. This feature will be added to the direct deposit records.
- Add Sequence number to query 164. This is in production.
- Collections effort. This is in the development environment. Kraig states that this is almost done. Thanks to Valley City for their help.
- Query 124, non-cashiering query. One school had problems. Is anyone using this query? Would this query be more helpful if it didn’t take so long to run? Let Marie & Kraig your school’s status.
- Aging Report. There has been a modification added for student group. Another request added today. This will hopefully be put in production before the Tools Upgrade.
- Kraig is working on the query for reference number item line. There is a wildcard feature. This is in development.
- Request from UND for aviation upload. This is currently being developed.
- DR request to add default dates to write-off dates. DR is being written and will be submitted for approval.

Further Items for Discussion:

18. NDSU states that dates for summer get together should be before August. LaDonna concurs and suggests either the end of June or mid July for possible
dates. LaDona and Crystal will look at dates. Normal SF meeting time is the 4th Wednesday which would be the 22nd of June. A suggestion was made to possible meet the afternoon of the 21st, enjoying a riverboat cruise in the evening, and continuing the meeting on the morning of June 22nd. Further information will be sent out and discussed at the May meeting.

19. Valley City states that Ann is leaving Valley City. She will be starting a new career as the Grant and Contract officer at NDSU. We wish her well. She was a great asset to Student Finance.

20. Angela reminded us to submit a ticket for summer tuition calculation.

21. Collaboration concerns need to be submitted to Angela and all who attended the collaborative meeting by noon on Thursday, April 28th.

22. Angela suggested we take note of items that could be addressed and added to the agenda for the June Face-to-Face meeting. She will need this information by the beginning of June.

Meeting minutes submitted by Dakota College at Bottineau, Loretta Forsberg

Next Meeting: May 25, 2011
Next Minutes: Dickinson