SF USER GROUP MINUTES
June 22, 2011

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

External File Load Process - Marie went over the handout emphasizing the changes that were made to the process.

Cashiering Page Default - The DR to have the Business Unit and Ledger default on the chartfields has been submitted and approved.

Linking NDU Account Summary to the Customer Account screen - Chelsea will do the DR to have a link from NDU Account Summary page back to Customer Account page. It will be hidden from the students and open a new window.

Campus Community update - Crystal and LaDona
At the last meeting, discussion took place on the problems of coding of residency. There are problems reporting to the state of MN on a number of students. Karin brought up the idea of a new residency code for their professional career students that should not be reported on the MN reciprocity report because they are not expecting to be reimbursed for these students. Issues need to be resolved because auditors are requesting reports on residency. This group has officially approved the new code. Right now the admissions form contains the residency information.

Global service indicator has been approved by the SF group. Will be brought forward to Pat Seaworth to see if it is legal and then on to the Campus Community Group for approval.

Angela asked the Campus Community representatives to post the minutes to the web.

Development Requests
Marie and Kraig went over the list of DRs. We need to be testing now and before the next freeze on Aug. 16. Because of the short amount of time, the following DRs will be tested by these people.

NDU_SF_0166    Chelsea
NDU_0064        Karin & Crystal
NDU_0084        Kelly & Judy
NDU_0115        Chelsea, Dee, & Janet
NDU_0126        Chelsea
NDU_0172        Dee & Marie
NDU_0199        Kelly & Mary
NDU_0206        Kraig
NDU_0204        Marie

July 9 looks like the date for the next attempt for tools upgrade.
There was discussion on the set-up on the tender keys associated with credit card transactions. At some institutions, credit card numbers were entered into the system. Karin will be submitting a DR requesting a new value to replace credit card and debit card which will be named CC/DB.

Discussion on 1098T’s included SSN coming over from HR after some institutions had processed their 1098T’s. Query 41 will be adding a citizenship status column. For all 9’s SSN, they will be automatically populated instead of manually.

Discussion on a Financial Agreement Obligation by students. After being sent to a collection agency, some students contested their obligation to pay.

**Update to Policy 830.1**
Janet brought to the attention of the group that with the new two day period to enter collaborative charges, some institutions may be out of compliance on their fee payment/disbursement dates.

**Update to Policy 830.2**
Mary requested that we look at changing the wording in the policy from “Students who withdraw from all classes before 9% of a term is completed shall receive a 100% refund of tuition and fees.” to 9% of a class.

**Posting NG 25% Waivers**
Discussion on how and when guard waivers were entered.

**Payment Plans**
Karin went over how NDSU does payment plans.

**Query of charges posted by user ID**
The issue was brought up because the auditors do not want cashiers doing credit posings.

**Processing stipends/fellowships to be paid through multiple payments**
The board office has requested a meeting with Angela to have all campuses using the same information. i.e. apples to apples