Student Finance User Group

Meeting: February 8th, 2012

Minutes

Members Present: DCB, DSU, LRSC, NDSCS, BSC, NDSU, MaSU, UND, WSC, MSU, VCSU

Linda Baeza Porter, Angela O’Leary, Deidre Muir, Marie Lindstrom, & Kraig Ronning

Absent: none

Update on Common Application (Linda Baeza Porter):

Linda Baeza Porter joined on our call regarding new configuration on the new Common Application and to answer any questions that we may have on the new application. Residency has been a large issue that the state has had. Aimee Copas and Linda Baeza Porter have been reviewing the Common Application to look at how it fits the campus and student needs. The Common Application for the most part will remain the same with some survey and additional residency coding questions to help determine proper residency. The final draft has been submitted to the Admission & Records FUG group. This application will be integrated with the Hobsons Online Application and will also be used for the paper format as well. Karin brought up an issue that NDSU is having with not being able to identify their international students because of the USA row in the citizenship section and asked that this be something to consider with the new Common Application. Mary from BSC stressed that residency is a huge issue when it comes to verifying residency for the auditors. Linda Baeza Porter stated that the online application will go through the residency questions and if there is any type of discrepancy, the application will go into a suspense category until someone can verify the residency. The biggest concern of the suspense applications and the paper format applications is the user entering the application and not having the proper documentation for the coded residency. Linda Baeza Porter would appreciate any and all information on any changes or situations that affect all users before the new application goes live.

Cash Management Authorizations (Angela O’Leary):

UND attended a webinar back in December to discuss different cash payment such as Title IV funds. The issues is that when a student receives their aid and they sign off that the aid can pay their charges, they have the option to sign off on having their aid pay other charges such as parking, etc. Chelsea discussed that there is a bullet on the accept/decline awards stating that the student can say yes or no but it has to be in writing. When the student accepts the award, they do not get to select a yes or no bullet so the funds can pay all charges once disbursed. Set up changes in item types as well as changes to identify students as needed may be needed if this is something that needs to be addressed at another date.

Financial Obligation Agreement Update (Angela O’Leary):

Chelsea and Dee have been working on verbiage for the Financial Obligation Agreement. Once everyone has agreed, it will be global and be seen by all students. Students will not be able to complete their enrollment until they click the Agree button and it will be term based. Many schools outside of North Dakota are doing this as well for their students. Angela stated that she thinks we need to add something regarding adding/dropping coursework is also in the agreement. Chelsea will be sending out a revised version of the agreement after adding information regarding adding/dropping coursework, changing the NDUS portion to “my institution(s)”, and the withdrawal process changes. Once the user group approves the agreement, the DR will be submitted and the document will be looked at by legal. Necessary changes will be made if legal requests it.
Communication Generation-Update (Angela O'Leary):

Emails have been sent out to request a letter that is sent for collections. Angela has been doing some testing with Sophie and downloadable files for the collection letters. The process would put the file onto the Sophie Server and then the file would be downloaded to the user’s computer for processing. Angela opened the floor to having one letter for each aging category. The goal is to have one letter for multiple aging categories. The next step is to make sure that all letters are sent to Angela so she can review them.

VA White Paper (Angela O'Leary):

Angela wanted to make sure that everyone is aware of the VA White Paper that was emailed out. With more and more veterans going back to school, the tracking and workload may become more for campuses. Oracle reviewed the document on Friday and Angela is waiting to hear what their plan is. Angela asks that everyone review the document when they are able to.

1098-T Issues (Marie Lindstrom):

Marie sent an email out earlier last week about the file to be transmitted to the IRS. The X’s on the forms have been replaced with spaces for the IRS purposes. The production one will be sent to the IRS at the end of March. Until the transmittal file is sent, they are still ORIGINAL transactions NOT corrections. The manual can be referred if any users have questions.

Recording of Chapter 33 benefits/Savings Plan Reimbursements (Karin):

IRS is going to possibly moving forward to having 3rd party payments disclosed. Campuses may want to review if they are using the correct item type. Any other 3rd party payments may want to be reviewed to make sure they fall under the proper tree nodes. Karin just wanted to make sure all campuses are aware of this possible upcoming issue. If any campuses are using the 3rd party contract for tuition/fees/books, they may want to separate them out. Angela feels this would be a good work group issue so that everything is fixed appropriately.

Perkins Loans (Chelsea):

Chelsea wanted to know which office handles these at their campuses. NDSU is willing to assist with this. Chelsea has to have their office look at each of their students’ accounts that are on the list of 2011 fall graduates from SLSC to verify specific details on disbursement dates. Chelsea plans to discuss this with SLSC and see what can make it easier on their campus as well as all campuses.

Segregation of Duties (Joann):

Joann has been having difficulties with the reconciling and writing checks/receipts. The largest issue is that in the Super User role, that person has the ability to do multiple transactions. With the limited staff at many campuses, this causes many issues. The auditors are looking at possible places where fraud can happen. Many campuses are having these same issues due to shortness of staff. Another meeting will be needed to talk about this in further detail.

Message Center DR (LaDonna and Mary Bergstrom):

Campus Community suggested a message on the Student Center. The DR has been submitted and it has to be approved for by each user group. The message would show up on their student center and would be for each student. An user would be able to post an individual message on a specific student center. This would assist with having a secondary place for students to receive messages if they aren’t checking their campus emails. BSC approved and NDSU seconded the approval.