Minutes of the
College and University Student Aid Directors (CUSAD) meeting
November 8, 2004

Participants: Jim Kennedy, NDSU; Marcia Pritchert, VCSU; Lynn Haverlock, WSC; Shirley Hanson, MaSU; Bruce Helgerud, UND; Robin Holden, UND; Katie Nettell, LRSC; Sandy Klein, DSU; Dale Gehring, MiSU; Jeanne Enebo, NDSU; Jeff Jacobs, BSC; Scott Mahar, HECN; and Peggy Wipf, NDUS.

Jim Kennedy called the meeting to order.

Satisfactory Academic Progress (SAP) and Military Benefits

As a result of a recent RMASFAA meeting, Jim Kennedy and Bruce Helgerud shared with the group the importance of ensuring that each of our NDUS campuses has in place and a published satisfactory academic progress (SAP) policy. The SME’s shared with the group they have developed a process that all our campuses can utilize with the implementation of People Soft that will ensure that each student is meeting SAP. The new process will have numerous features built into it that will produce warning, probation, and suspension letters at various times as well as a process to inform a student of their right to an appeal.

Jeff Jacobs stated that BSC, DSU, LRSC, MaSU, NDSCS, VCSU, and WSC plan to test SAP at their November 29 – December 1 training session in Bismarck. Jeff also indicated that the SME’s are working with HECN to ensure a smooth transition from Legacy to People Soft relative to SAP.

Jim Kennedy shared with the group that he asked Jeff Baker from the U.S. Department of Education for clarification as to what military benefits should be reported on the Free Application for Federal Student Aid (FAFSA). Presently participants indicated they encourage military personnel to report all military earnings on the FAFSA as income (in accordance with the regs) and they then exercise professional judgment and back it out when calculating a student’s family expected contribution. Mr. Baker stated that combat pay is not to be reported on the FAFSA. Because of this conflicting information Jim asked Mr. Baker for the Department of Education’s clarification.

Jim further stated that SAP and Return of Title IV funds are the two biggest audit finding areas by the Department of Education that produce a fine to a campus for not meeting the necessary federal requirements.

Budgets

CUSAD members discussed the budgeting and packaging process.

The group agreed that the building of a student’s budget for financial aid purposes is an estimate of a student’s cost of attendance. To ease the burden of budgeting in People
Soft, the group discussed the implications of reducing the number of budget-types a campus utilizes, e.g., on-campus; off-campus, with parents, and will re-visit the issue at their next meeting. Jim Kennedy suggested that by surveying a campuses student population would give them a good sampling for justifying streamlining the number of budgets a campus uses. The group also agreed they need to develop and publish their campus budgeting policy.

With the implementation of People Soft, it was recommended by the SME’s to package a student full-year, full-time and to only adjust a student’s budget at the student’s request as this is a cumbersome manual process and that packaging full-year, full-time has no audit implications. Scott Mahar indicated that a query would be developed to identify which students are less than full-time for budgeting purposes.

Robin Holden recommended to the group, based on Consumer Price Index information, that for academic year 2005-06 the miscellaneous expense line-item within a student’s cost of attendance budget for our NDUS campuses be $2900. This is a two percent increase over the 2004-05 figure of $2850. There was consensus among the participants to accept this recommendation and it was further stated that the $2900 figure is a suggested target and may fluctuate slightly among the campuses.

Katie Nettell, on behalf of Lynn Aaberg, recommended that for academic year 2005-06 the books and supplies line item within a student’s cost of attendance budget for our NDUS campuses be $800. This recommendation is a result of Lynn’s random survey of our NDUS institutions. There was consensus among the participants to accept this recommendation and it was again further stated that the $800 figure is a suggested target and may fluctuate slightly among the campuses.

**Students who add classes after published date**

Sandy Klein expressed a concern about financial aid directors’ responsibility of adjusting budgets for student’s who added classes after census date. The participants agreed that adjusting budgets up and down according to a student’s class load is a huge manual process and suggested for academic year 2005-06 that all campuses budget students based on full-time, full-year status.

**Financial Aid Nights**

Participants reported they are moving away from the traditional parent/student financial aid night information sessions and are using other means of training family units about applying for financial aid, e.g., Web X, College Goal Sunday, IVN, Internet interaction sessions.

**People Soft Discussion**

Scott Mahar apprised the group that:
- Work on the SAP policy with the programmer is on track.
Work on the FISAP report is scheduled for completion in time for meeting the December 15 reporting requirement.

The help-desk is receiving 40 financial aid related PTR’s a week and with additional training hopes to reduce that number significantly. Scott indicated that when a PTR is closed, Paula will send out the results to a closed list serve that includes financial aid directors.

Focus groups are being formed to take care of a specific People Soft issue and they will be asked to run with it and recommend a solution, e.g., address usage.

To be placed on the CND listserv, call the Help desk.

Cross training among the modules has begun at HECN.

The two new job openings at HECN have been placed on-hold.

HECN will be looking to the SME’s to help trouble shoot PTR’s.

The “favorites” feature in People Soft is being re-designed and will allow campuses to publish campus news items to their whole student population.

The most recent collaborative process document will be forwarded to each director.

The best way to learn a process in People Soft is to work with Paula on a PTR to find a solution to a campus financial aid issue.

Other People Soft Issues Discussed by the Group

- Loan training needed.
- Updating of campus policy and procedures manual.
- Re-design of campus job descriptions as a result of People Soft implementation.
- The need for high-speed printers.
- How to handle the payment of financial aid as well as a student’s withdrawal and the unique timing that occurs between each student module. It was suggested that the respective student modules need to meet on their campuses and work through this process.
- Returning of loan funds and the possibility of requesting security for use of the Financials Modules information to help expedite the process.
- Use of financial aid list-serve to help with problem solving.
- The need for future ad hoc reporting. Jim was going to address this concern with the steering committee as it is a technical issue and has financial implications.
- How does financial aid packaging work after campus conversion of continuing and new students?
- Re-packaging of financial aid based on attrition.
- How to handle self-service withdraws.
- How will “W” and “WN” grades be counted relative to financial aid processing?

The group agreed that the above issues would be re-visited at future meetings.

Meeting adjourned.

Prepared by:
Peggy Wipf