Minutes of the
College and University Student Aid Directors (CUSAD) Conference Call
Wednesday, March 9, 2005

Participants: Betty Schumacher, Marsha Pritchert, VCSU; Lynn Aaberg, WSC; Robin Holden, UND; Diane Christenson, MiSU-Bottineau; James Kennedy, Jeanne Enebo, NDSU; Carmon Mahrol, Shelley Blome, NDSCS; Dale Gehring, MiSU; Shirley Hanson, MaSU; Kattie Nettell, LRSC; Jeff Jacobs, BSC; Sandy Klein, DSU; Paula Kurtz, Dennis Junk, Scott Mahar, HECN; Laura Glatt, Peggy Wipf, NDUS.

Betty Schumacher called the meeting to order and welcomed everyone.

CUSAD’s role in People Soft structure – CUSAD/USER group
Laura Glatt began by thanking the financial aid group for the outstanding job they’ve done with the implementation of the financial aid module within CND. She went on to say that this group is viewed as a model by not only the project staff, but also other functional groups, of how to function in the new CND environment and are being recognized for addressing tough issues and finding solutions in a collegial manner. She also praised the group for involving HECN and NDUS office staff in the whole development process and encouraged the group to continue to keep these partners in the group to allow them to understand the issues and respond to them.

Laura outlined briefly where the financial aid group fits into the new draft CND governance structure. She indicated that the CND executive steering committee has reviewed several draft governance models and a final model has not been approved. The plan is for the SBHE to approve a permanent governance structure at their May meeting. Laura said the permanent governance structure includes not only the NDUS, but also our state government partners, since there are issues which will impact both.

Laura stated the draft CND governance structure is built around business/functional user teams. These are the traditional, and perhaps some new, teams like: financial aid, registrars, admissions, controllers, budget, payroll, etc. These teams would continue to meet to share issues, solutions and knowledge. However, at times, issues in one of these “silo” groups impact other modules. These issues would float to a NDUS inter-functional team. With project staff involvement, this team would work through and resolve issues impacting more than one area/module. Major issues, impacting policy or operations would likely need to move onto one or perhaps more of the major Councils (Academic, Administrative and Student Affairs), before moving onto the Chancellor’s Cabinet and perhaps ultimately the SBHE.

Laura acknowledged the pressure the CND project has put on campus staff that were asked to help implement PS while still having to manage their workloads back on campus or of others who had to step-in on campus and assume additional workload as a result of a campuses staff commitment. Recognizing the fact that there are not enough people at HECN to find a solution to each PS problem, Laura challenged our functional group to focus on ways to help each other problem-solve. She alluded to the fact that each group,
including financial aid, has a broad base of knowledge that needs to be utilized, whether it be problem-solving of a PTR and sharing the result with all institutions or assisting with training needs when called upon.

Jeff Jacobs asked how each campus plans to continue to report their campuses information for the Production Report. Scott Mahar stated that each student-side user group will be developing and reporting for the Production Report in the future. The SME’s will be responsible for writing the report for the Production Report. Scott encouraged campuses to first use their campus and the listserv to address issues and to reserve PTR’s for major issues they are unable to resolve. Scott went on to encourage everyone who receives a resolution to a PTR, that they forward the question and resolution on to the full group as an information piece as others may have been experiencing the same problems.

Lynn Aaberg asked if the Production Report would continue to be color-coded? Laura Glatt responded that campuses were given opportunity to provide written comments as to why an institution had been color-coded a certain way.

James Kennedy felt the user group concept was a good idea and stated that a good line of communication is essential as we move forward with laying issues on the table and finding a resolution to them. Laura reiterated the financial aid user group will need to find ways to help each other find solutions to PS problems as project staff (HECN) will be addressing more development and query requests.

Sandy Klein asked how the ERP listserv should be utilized. Scott Mahar responded one way to effectively use the listserv is when a PTR response is received to a question, that response should be sent to the full listserv stating the question and forwarding the resolution regarding a particular issue.

James Kennedy commended Paula Kurtz for all her hard work on this project. All agreed.

**Who are the SME’s and who appointed them (review)?**
Scott Mahar reviewed for the group how SME’s were selected. He indicated three years ago that project managers and presidents were asked to submit names to the steering committee for consideration with the goal of having representation from each institution-type on each functional group. If the presidents felt that too many experts were being tapped from their campus, then a bartering process ensued. That is how we got to where we are today. Scott indicated the original SME’s were Jeanne Enebo, Dale Gehring, Jeff Jacobs, and Peggy Wipf. Today, the SME’s are: Shelley Blome, Jeanne Enebo, Dale Gehring, Marcia Pritchert, and Peggy Wipf.

Laura Glatt interjected that the draft CND inter-function working group, which is part of the proposed permanent governance structure, may include 5 persons from the student side, 3 from financial side, 2 from human resources, and 3 project directors. Betty Schumacher asked when the PS governance structure would be finalized. Laura responded possibly May.
Summer Session Process

There was good discussion and questions about how the NDUS campuses plan to process financial aid for summer. It was stated that the processing of financial aid for summer session will be completed on a student by student basis in PS.

Paula Kurtz provided a handout titled, ‘Summer Financial Aid Processing’ to jump-start our discussions. Jeff Jacobs suggested a few additions to Paula’s document, e.g., create budget categories, add new value budget groups, add budget items for books/supplies. It was noted that student records academic load levels need to be set up yet.

Paula referenced the Return of Title IV funds worksheet and reminded financial aid personnel to use the start and stop dates as appropriate for calculation purposes.

Jeff Jacobs reminded the group that the SME’s decided the upcoming basic summer term is any time period between May 1, 2005, through August 20, 2005, and that classes reflect the start and end dates of a class within that time period for awarding purposes. Jeff went on to say the SME’s also decided, in the implementation phase of PS, to utilize Formula 1 when taking the award amount for the year and calculating Pell Grant payments for the students. The decision by the SME’s to use Formula 1 for awarding purposes was based upon being in compliance with federal regs, i.e., for Pell Grant calculation for credit-hour term programs with fall through spring standard terms that provide 30+ weeks of instructional time – use formula 1. DSU felt strongly that they needed to use Formula 3 for summer awarding because they felt it would save campus-based dollars, make more student eligible for aid, and reduce student loan debt. VCSU stated while their campus has always used formula 1 for packaging of student aid, they felt strongly that they needed to continue to adjust individual budgets based on a student’s enrollment level in order to serve as many students possible with their limited campus-based dollars. Scott Mahar reminded us that while federal regulations permit the use of various formulas to calculate financial aid, best business practices and standardization reduces financial aid offices workloads as well as sends a consistent message to all students who are enrolled at multi-campuses. Another thing to keep in mind is as PS patches are added, it will be extremely difficult for project staff to assist with problem solving if something goes wrong.

James Kennedy encouraged all to reference the 2004-05 Federal Student Aid Handbook – Chapter 3: Calculating Awards and Packaging on other ways to package for summer using formula 1.

A question was also raised, does summer work-study count as a resource for the following fall term? The responses seemed to imply, yes.

Paula and Lynn Aaberg were going to explore (and report back to the group) unique options for a group of program students (including internship that extend into fall term) when awarding of summer aid. Can summer session include two mini-sessions?
There was discussion regarding work-study during summer and it was decided that it was a campus decision to offer work-study or not.

Paula was also going to research if different item-types for summer session were needed (custom split) and inform the group.

**Packaging full-time/full-year**

James Kennedy reviewed with the group the issue of packaging of financial aid “full-time, full-year” per our November 8, 2004, CUSAD discussion in Devils Lake. James referenced Fran Susman’s response to, “What are the federal requirements on adjusting cost of attendance if the student’s enrollment status changes?” Fran’s response was:

“*The regulations don't require any recalculation for changes in enrollment status after the student has begun attendance in all of his or her classes. However, schools may have a policy of recalculating an award if a student's enrollment status changes within a term. If such a policy is established, it must be applied consistently to all students. For example, if the school chooses to recalculate for a student whose enrollment status changes from half-time to full-time, it must also recalculate for a student whose enrollment status decreases. If the school establishes a policy allowing optional recalculations for an educational program, this policy must be in writing.*

*A school's policy may set a date after which Pell Grants will not be recalculated for enrollment status changes. For example, a school can establish a policy that it will recalculate Pell awards only for enrollment changes that occur up to the “add/drop” date of a term.*

*If a school does not establish a policy for recalculation within a term, a student who begins attendance in all classes would be paid based on the initial calculation, even if his or her enrollment status changes before the disbursement is made.*

*You are not required to recalculate Pell awards for cost changes during the award year. For instance, if the student gets accepted into on-campus housing after the fall term and your student budget for on-campus housing is lower, you are not required to recalculate the student's Pell award. If you choose to recalculate for changes in costs, you have to consistently apply that recalculation policy.*

*If you recalculate a Pell award because the student's enrollment status has changed, you must also take into account any changes in the student's costs at that time.*

*A school may have a policy of recalculating awards when the cost of attendance changes from one payment period to the next—for example, because of changes to the student's tuition and fee costs, or because a student's living situation changes (such as when a student moves off-campus). Schools also have the option to establish a policy to recalculate financial aid awards when a student's costs change within a payment period. Note: You may have a policy of recalculating for cost changes from one payment period to the next, and at the same time, have a policy not to recalculate for cost changes within a payment period.*

*You may not recalculate the payment for a payment period that took place before the cost change. For instance, in the example above, if the student lives in the dormitory during the first quarter and then moves off campus for the second and third quarters, the recalculation would only affect the payments for the second and third quarters.*

Based upon the best practices recommendation of the SME’s and understanding that adjusting a student’s financial aid package downward if their enrollment status changes is
a manual process, the majority of institutions agreed they would be packaging full-time, full-year. A couple of smaller institutions felt they needed to downward adjust a student’s financial aid package if the student’s enrollment status changed, to ensure that their limited campus-based funds would go further. Paula Kurtz informed the group that the configuration of packaging in People Soft was set-up based on full-time; full-year. Scott Mahar reminded the group that those campuses choosing to not package full-time, full-year would be responsible for costs associated in the manual processing of adjusting budgets and shared his continued concern that the project staff does not have the resources to fix problems that may arise as a result of adjusting a student’s financial aid package. **The group did agree to re-visit this issue again** and participants were encouraged to review the information in Financial Aid Handbook regarding this issue.

Jeff Jacobs and Shelley Blome informed the group for academic year 2005-06, they plan to use an average credit load for packaging purposes. Jeff stated that BSC took the total number of credits students took (at the time of third-week reporting) and divided it by the total headcount (on that same third-week reporting date) to arrive at an average credit load per student.

Before Paula Kurtz had to leave the meeting, she informed the group of an INAS fix that was going into Production on 3/19/05 that would allow a student’s second ISIR to load and update (populate) the student’s ISIR information. Paula also informed the group that the Skip-Suspended option was applied to several schools.

**Census Date Issues**
Scott Mahar reviewed the census date by module and the implications:

“**Student Financials** – doesn’t have a census date. We instead use a per course refund policy and a census date has no role in this process.

**Financial Aid** – has a census date. This is the date, usually the end of 100% refund, that the Federal Pell Grant enrollment is locked. At the census date if a student is full-time the award will be locked at full time. If Financial Aid does not have a census date setup the process will then pick up the student records date and use it for the Pell locking purpose.

**Student Records** – Student records has a census date that conceptually should be used for IPEDS reporting. However, because we customized the IPEDS reporting and do the process manually it has no impact on the module.

As to how the census date relates to Board Policy:

**Section 440** – has no impact. Currently the policy states that the third week reports will be run on the 15th day. Additionally, Academic Affairs Council has recently discussed whether that is actually counting or not counting the Monday when the 4pm classes begin. As to the technical impact neither is relevant. We simply need to be told what day to run the process and the student records census date doesn’t impact that decision.
Section 830.2 Refund Policy – This policy has been amended to look at percentage of a course completion and not census dates. The setup in ConnectND is that we will base refunds by course and the start and end date of the course. Therefore, courses starting on the Monday after 4pm would have that date as the starting date. Those starting on the Tuesday would have that date as the starting date. Unlike how it used to read we would then base the refund on the percentage of the course that’s been complete.

Section 830.2 Refunds – As with 830.2 Refund Policy this policy has also been amended to look at percentage of course completion versus actual dates of enrollment. An example would be in bullet point 2 where it states “students who drop a class or classes prior to the completion of 9%.....” Because we have switched to percentage of course completion the student records census date has no implication.

In summary, because we have changed policies to reflect percentage of course completion the use of the ‘census date’ and the affects it has across modules has been effectively eliminated. This change has made each of the areas less dependent upon the accuracy of others and allows the Institutions more flexibility in scheduling start/stop dates of courses. Unlike the old policies and setup we are less dependent upon date which allows more flexibility.”

Scott reminded the group that the census date to use for refund purposes is the start and end date of a class. Sandy Klein felt that the satisfactory academic progress process needed to be updated to reflect appropriate percentages per the information provided by Scott. Paula will review this and send out a follow-up e-mail to the group.

Clearinghouse Issues
Lynn Aaberg asked the group if others were receiving e-mails from the Clearinghouse regarding “grad only reports” that were due 12/31/04. Scott informed the group that the Records module was handling this issue.

Other
James Kennedy informed the group that financial aid imaging, as we currently know it, is going away September 30, 2005, and ALL of you need to notify James (to relay on to Dorette Kerian) that you need legacy financial aid data saved via Image Now. [I believe 3 years of data needs to be saved.] URGENT ACTION NEEDED. James did say that if he does not hear from you, he would assume you have taken care of this issue for your campus.

Jeff Jacobs and Shelley Blome requested that HECN re-send the timeline of events document, e.g., when to load ISIR, etc.

Prepared by:
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