Minutes of the
College and University Student Aid Directors (CUSAD) Conference Call
Wednesday, April 6, 2005

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

Betty Schumacher called the meeting to order and welcomed everyone.

Much of our conference call centered on sharing of information and ideas relative to PeopleSoft implementation. What is working for some; what is not.

Satisfactory Academic Progress (SAP)
Paula Kurtz informed the group she is working with Acey (programmer) to re-write many of the components of the current SAP report and will be e-mailing those changes, when complete. Paula reminded us when SAP is run for 2006, it will automatically populate many fields for packaging status summary and negative service indicator purposes. Paula mentioned she and Acey are working on: negative service indicator options, which are set-up as information only; simulation-run options. Paula stated that once all SAP changes have been made and tested, there will be a training session to ensure everyone knows how to not only run the report, but also has a better understanding of letter generations, etc. It may be possible to use the WEB X option for training of SAP with follow-up occurring on our May 11 conference call.

Betty Schumacher, VCSU, (and Paula Kurtz concurred) strongly encouraged new schools to PS not to package upper-class students until after SAP is run for the current spring term. This will eliminate a lot of manual re-work.

Scott again stressed the importance of each one who submits a PTR sharing with the financial aid list serve the results.

Lynn Aaberg asked how institutions are dealing with “exception credits” for transfer students and for students who already have a baccalaureate degree and are returning to school for a two-year degree and who determines, on their campus, which previous courses count towards a second degree. Lynn, and Jeff Jacobs, indicated that they are noticing an increase of baccalaureate-degree holders returning to school for a two-year degree. James Kennedy suggested that aid offices work very closely with their registrars to determine which courses would apply to a new degree. James also suggested maintaining letters of appeals from students and the supporting documentation from the registrar’s office that reflects the elimination of courses that don’t pertain to the new degree being sought and package for financial aid accordingly.
Average Credit for Pell Awarding (Re-visit)
The majority of the group felt comfortable with packaging/awarding based upon full-time/full year based on our March 9, 2005, conference call discussion. Again, if an institution chooses to do packaging/awarding differently, they will encounter a lot of manual work and little, if any, support for problem-solving from HECN.

Commonline
Paula Kurtz informed the group that their office is in the process of testing and/or processing alternative loans connected with Commonline. The next step is to begin testing with SLND for all lenders associated with them. After this is complete, HECN will begin testing the corrections, via Commonline, with SLND.

Backup of financial aid legacy files
James Kennedy again reminded and encouraged all institutions to back-up for three years their financial aid Legacy data for audit retrieval as our current information will be gone after September 30, 2005.

Query Updates
Paula Kurtz indicated she is working on several query requests, as follows: #20 – residency code; #77 – loans (sub-loans/remaining need); #78 – Federal Perkins award; #79 – Suspended ISIRs; #80 – students not attending; #81 Federal Pell Grant queries (undergrad not available); #82 – program to provide list for students who applied for aid; #83 – disbursement (sub/unsub); #84 – one-term (single-term) students, by months in INAS; #85 – less than half-time student list; #86 – AGI versus worksheet C; #87 – EFC’s higher than budgets. Other queries being updated or considered: all F’s; loans accepted; additional residencies options; unprocessed EFT’s; totals list for specific item types; fund roster by academic year (fall/spring). The SME’s will need to compare the initial list they developed on queries against what HECN has to ensure that all requests have been addressed.

Sandy Klein asked how other campuses were handling special condition overrides made by other campuses as well as conditional admits for students with no GED or high school diploma. Scott Mahar informed Sandy that the campus defines ISIR data load parameters, and thus, challenged her to visit with her records personnel to discuss best business practices on how to control what financial aid information is loaded in comparison to a student’s admit record. Scott also encouraged DSU to visit with Trish at HECN on the conditional admit question as in most cases a lot of how a campus day-to-day business is handled should be around a sound business process.

Discussion ensued on IPEDS queries and common data sets. Shirley Hanson and Betty Schumacher reported that their Records office supplies the information needed for IPEDS reporting, including financial aid. Shirley will verify this and report back. According to HECN, IPEDS querying is a ‘student records’ delivered report provided in People Soft.
A question was raised as to how campuses ensure that a student doesn’t earn more work-study dollars than they are supposed to. Scott informed the group that work-study information is drawn from the human resource-side in PS and encouraged each campus to work with their HR person on campus to explore some reporting options. Paula mentioned a H-14 earnings report—from the awards earnings page.

Scott again challenged the financial aid personnel to work with their varying campus module to develop best business practices on performing various functions in PS.

**Packaging for summer (re-visit)**
Jeff Jacobs highlighted some areas for campuses to watch as they begin summer awarding, i.e., financial aid term build, two different careers assigned. Budgets, unable to print award letters (need LN letter in template), need a third-party award letter for summer (Jeff needs to follow-up on a PTR for this). **Dennis Junk will be sending out the most current document on Summer Financial Aid Processing.**

**Budgeting and Packaging**
HECN reminded the group that there are many timing issues relative to budgeting and packaging that we need to keep in mind before beginning a new award year for 2005-06, i.e., conversation of records information needs to take place before packaging and if you package 2005-06 upper-class students now in PS, they will package based upon the current grade level and not the next level. HECN reported that they are not anticipating any problems with the scheduled roll-overs.

**Award letters**
Jeff Jacobs asked if there was a way to identify an original award letter from a revised one. HECN indicated that we will need to re-visit various award letter options in the future.

**Other**
Peggy informed the group that State Grant awards may not be made until late-May as a result of pending legislation.

**Future meetings**
The group felt the monthly conference calls have been very useful. The next scheduled call is **May 11, 2005, from 1-3 p.m.**

Scott informed the group that the Steering Committee will be making a decision soon on the governance structure of the respective PS modules and the makeup of the CUSAD group may be impacted.

Prepared by:
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