CUSAD Minutes
Via Conference Call, August 9, 2006

Participants: Lynn Aaberg, WSC; Robin Holden, UND; Katie Nettell, LRSC; Betty Schumacher, VCSU; Jeanne Enebo, NDSU; Sandy Klein, DSU; Jeff Jacobs, BSC; Dale Gehring, MiSU; Diane Christenson, MiSU-Bottineau Campus; Shirley Hanson, MaSU; Shelley Blome, NDSCS; Dennis Junk, HECN; Peggy Wipf, NDUS

ACG/SMART Grant
Chairman Jeff Jacobs began the meeting with a discussion/interaction session regarding the Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent (SMART) Grant to find out where everyone is in their processing and to work through questions everyone may have. Jeff shared BSC’s challenges in identifying which Pell eligible students met core, as that was something new for them as a 2-year institution. Other ACG/SMART Grant discussions included: 1) what to do if a student is not a new high school graduate; 2) based upon ACG requirements relative to graduation date, grade point average, the number of credits earned during the year (a snap shot of a student’s record) etc., how and when to determine how much funding an eligible Pell student should receive; 3) when to review a student’s record for AC eligibility – each semester, yearly, or at financial aid census date; 4) are institutions required to continually self-identify ACG eligible students; 5) how to handle ACG potential students who are not full-time; 6) how to handle ACG students in accelerated programs of study; 7) how to handle Pell eligible students who were admitted under an “admissions exception clause last year”; 8) how are campuses monitoring if Pell eligible students are meeting the alternative rigorous program requirement and how are campuses documenting this – e.g., keeping copy of transcript and attaching it to a developed worksheet; 9) how to handle dual credit Pell eligible students.

Members continue to seek guidance to their ACG/SMART Grant questions from the USDOE (IFAP) and/or Webinar sessions, as well as their colleagues. Members stated they are making a good faith effort in finding answers to their ACG scenarios; however, members are frustrated by the lack of response from the USDOE to their questions.

Financial Aid User Group—CUSAD
Jeff indicated he will be submitting to Bonnie Neas a listing of CUSAD user group voting members, as well as ex-official members.

It was the consensus of CUSAD members to endorse Shelley Blome as chair of the CUSAD user group for the term of September 1 – August 30. It was endorsed by the CUSAD group to continue to meet on a monthly basis. The financial aid user/CUSAD group, comprised of financial aid directors, will serve as ConnectND advisors and also advise on other financial aid issues. The financial aid directors will continue to be the voting members; however, other aid personnel may attend CUSAD meetings.
Service Indicators for AC/SMART grants
It was the consensus of the group to have Dennis at HECN develop a checklist in PeopleSoft to help manage communication by the campuses as to which students have been evaluated for ACG/SMART grant eligibility. The checklist would be a great monitoring tool to track students who were awarded a Pell; then a checklist would be attached to the item type, thus eliminating a lot of manual work. The group recommended the checklist option be given a high priority, but not as high a priority as SAP. Dennis felt the checklist would require very little development time. Jeanne pointed out that once a student’s checklist item is completed, it no longer appears on the student’s portal ‘to do’ list. There is urgency to this request to help campuses eliminate over-awarding and the origination and disbursing of student loans.

Return of Title IV Funds Worksheets
Jeff shared with the group that Oracle will not be delivering a new Return of Title IV funds worksheet (because of the lateness of the passage of the HERA bill) so it is strongly suggested that campuses use the return of fund worksheet available on FAA Access for this fall.

FISAP
Dennis shared with the group that campuses are able to run their FISAP report. The deadline to complete it is September 29, 2006. Dennis was encouraged to e-mail the campuses the instructions of how to run the FISAP report.

SAP
Jeff requested (as a result of an earlier e-mail) all campuses forward, by Friday, August 11, documentation relative to SAP problems they are experiencing. He needs to forward these problems to Bonnie Neas and Scott Mahar. Jeff indicated that Bonnie is committed to hiring a consultant to look at why SAP is not working. If he does not hear from the directors, he will report that SAP is not broken. Jeff shared a comment Lynn made to him: “(paraphrased) that because SAP is so critical, that as a group, we need to make sure that SAP is always on the forefront, in that when there is a SAP change resources be devoted to that change as the highest priority.” [Dennis agreed to check if a negative service indicator to identify ‘incompletes’ is on the financial aid to do list. He will report back to the group his findings.]

Timing of Financial Aid Process Runs
Dennis reported to the group of an effort afoot to try to make things run as efficiently as possible. A couple of initiatives are underway: 1) there are a number of consultants in looking at the hardware and the database, 2) trying to do a lot of fine-tuning. That is part of the reason that we haven’t heard anything about red days at this point in time. That decision is being deferred pending what the consultants find as they are working on getting everything as fine-tuned as they can. He reported that one of the things that HECN is looking at in conjunction to that is the timing and frequency of the loan processes we are currently doing. It is being suggested that the importing/exporting of loans occur once a day. An example given was import loans at 8 a.m. and export loans at 3 p.m. Dennis asked if this would have an adverse impact on our students. Jeff asked if
it would be possible to import loans at 7:30 a.m. versus 8 a.m. Dennis’ response was because production control personnel come in at 8 a.m. this is why 8 a.m. is being recommended and it would take some coordination beyond his level to change times.

It was the consensus of the group to run the loan import process early in the morning and the export process later in the day. It was also the consensus to run both processes once during the day versus two times a day, as is the current practice. Dennis will coordinate a schedule, by campus, with specific times to run inbound/outbound processes and will send out to the group.

2007-08 Miscellaneous Expense Item
Robin recommended to the group, based upon Consumer Price Index information, for academic year 2007-08 the miscellaneous expense line-item within a student’s cost of attendance budget for our NDUS campuses be $3,060. This is a 3 percent increase over the 2006-07 figure of $2,970. All voted aye to accept this increase as a suggested target within a student’s budget, with the understanding that it may fluctuate slightly among campuses.

Security Rules
Dale indicated that the only place his aid personnel staff can see some of the data, like the fiscal item types—the amounts of funds that are out there and available for awarding purposes, is in set-up. He indicated for his staff working with various financial aid programs, it would be nice if they could look at an inquiry only screen in view set-up financial aid program totals. He suggested that a role be established for inquiry purposes into set-up. Dennis suggested that for all aid professionals who have financial aid inquiry roles, by just adding the viewing of set-ups for ‘inquiry only’ purposes as a way to give others access to set-up dollar totals. Some expressed a concern about this idea, because they give financial aid inquiry access to personnel outside of their department. Dennis will be checking this option out further as to who has access to special inquiry roles and will report back to the group.

Books and Supplies Item
It was recommended that the books and supplies cost of attendance budget agenda item for 2007-08 be delayed until October in order for campuses to survey their book stores after the start of school and find out how much, on average, students are spending for books and supplies.

Next meetings
The next scheduled CUSAD meeting is a face-to-face meeting in Wahpeton. The dates of the meeting are October 2 (noon), 3, and 4 (noon). The meeting will be a training/interaction meeting. Agenda items: SAP, review of development requests (DR) list and set prioritizes, 2007-08 books/supplies COA line-item, change file training, set-up of alternative loans, AC/SMART return of Title IV funds, review of set-ups, etc.

Prepared by:
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