CUSAD Minutes
October 2-4, 2006

Participants: Lynn Aaberg, WSC; Robin Holden, Sara Brown, Lisa Earls, UND; Katie Nettell, LRSC; Betty Schumacher, Marcia Pritchert, VCSU; Jeanne Enebo, Sandy Hill, NDSU; Christopher Meek, Stephanie Suko, DSU; Jeff Jacobs, BSC; Dale Gehring, MiSU; Diane Christenson, MiSU-Bottineau Campus; Shirley Hanson, MaSU; Shelley Blome, NDSCS; Sue Applegren, Dennis Junk, Scott Mahar, Bonnie Neas, HECN; Peggy Wipf, NDUS

Shelley Blome, NDSCS, welcomed all to their campus. Shelley Blome, this years chairperson, began the CUSAD/Functional User Group training meeting by asking each participate to share what they felt is working well in People Soft and to share what they felt still needs work.

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<th>What is working well in People Soft</th>
<th>What do we still need to work on in People Soft</th>
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<td>• Forced us to review our business processes. We work more as a team to troubleshoot.</td>
<td>• Satisfactory Academic Progress (on-going enhancements).</td>
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<td>• Work more closely with other offices, i.e., student records and finance. Feel the aid office has earned more respect from other offices. Student loan processing is much better.</td>
<td>• ACG/SMART grant program challenges. The federal eligibility criteria makes the ACG process totally manual.</td>
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<td>• Expanded the lines of communication with various lenders (loans) via electronic fund transfer process.</td>
<td>• Concerned about system set-up. Needs review.</td>
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<td>• Created more efficiency in the office.</td>
<td>• Want PS electronic financial aid award letter functionality.</td>
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<td>• We have a better working relationship with the business office.</td>
<td>• Would like the capability to use varied formulas to calculate financial aid.</td>
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<td>• Processing of loans really works well.</td>
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<td>• Letter gen, Pell Grant reconciliation, queries.</td>
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<td>• Very powerful system.</td>
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<td>• Can’t remember when we started. We need to learn how to change and standardize processes.</td>
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<td>• Student has more information at their fingertips, i.e., billing information.</td>
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Students are getting their information from the portal. Eliminating lines in our office. Query and report functionality.

Guiding Principles
Shelley reviewed the following draft ConnectND User Group Guidelines (July 2006).

The following are guidelines or guiding principles for the ConnectND User Groups.

Expectations
- Each campus will submit the name of one individual from their campus to be their representative on each ConnectND User Group; although, additional campus employees may attend user group meetings.
- Each campus will have one vote on each ConnectND User Group. This individual will be the campus identified representative or their designee.
- Each user group will name their group’s Chair.
- Campus representatives will be encouraged to take an active role in performing tasks (i.e. perform testing, etc.) having system-wide impact as designated by the Application Director.
- Decisions are to be made with the enterprise perspective in mind.
- Enterprise issues and solutions having system-wide impact take precedence over individual campus issues and solutions.
- User groups will be vehicles for gaining user input from across all campuses, with final decision-making authority resting at the application director level, with opportunity for selective appeal to the ConnectND Director.

Roles and Responsibilities
- Provide State Government and NDUS business practices and customer service leadership within ConnectND.
- Make recommendations to the Application Director on planning, implementation, and communications to enable ConnectND to meet business process requirements.
- Recommend development and implementation priorities.
- Assist with documentation and training.
- Assist with system testing.
- Act as resources for issue resolution and system enhancements.
- Develop recommendations for change requests, based on a documented business case.
- Discuss common issues and solutions among the user group.
- Assist the Campus Advisory Committee with preparation and communications of the annual report.
- Forward recommendations to the Campus Advisory Committee which is the level of governance that communicates directly with the ConnectND Director.
Roles and responsibilities will continue to evolve over time and may change based on other changes in the ConnectND governance structure. Additionally, there may be issues which impact policy or are significant in nature, requiring additional review by a senior council, Chancellor’s Cabinet, or SBHE.

Shelley reinforced that the above guiding principles stress testing and the importance of it - ownership of the software – our software.

Books and Supplies COA Item
It was moved by Jeff Jacobs and seconded by Dale Gehring that the books and supplies line item within a student’s cost of attendance budget increase to $900 for academic year 2007-08. This is a 12.5 percent increase over the 2006-07 amount of $800. All voted aye. The motion carried. It was stated that $900 is a suggested target and many fluctuate slightly among campuses.

AC/SMART Grant Return of Title IV Funds
It was reported that the calculation of Return of Title IV funds for students who are ACG eligible and drop is currently a manual process. However, HECN reported that once the next PS bundle is installed it would include the electronic calculation for ACG grants. Thus, the next PS upgrade would eliminate this manual process.

State Grant Enrollment Verification
Jeff asked Peggy if there was any reason the State Grant enrollment verification report had to be run at third-week versus at census date. Peggy responded she thought it was an audit requirement, but will check into.

Jeff also asked if it was possible by mid-August of each year to remove all State Grant awardees who have a “No Response” next to their name on the HE1020 report and re-run and send this report out to the campuses. Other campuses agreed with this request. Peggy indicated this would not be a problem.

Development Requests
The group reviewed the 40+ development requests – prioritized and not-prioritized lists—and agreed the following were the current top 11 development requests: SAP, NSLDS, ACG, Dropped Classes, Failed to Package (no award letters), Self Service, ISIR Load, Pell (with batch), One-Term, Pell only Packaging Plan, Freeze Budgets. Dennis shared with the group that PS 9.0 version has SAP built into it.

Electronic Award Letters
Dale expressed a strong interest in sending out electronic award letters next fall. Robin shared with the group that UND, with assistance from USA Funds (Sallie Mae), sent e-mails to their students this year to accept their financial aid awards electronically through a secured system (password and ID required). Others liked this model. Dennis indicated that PS 8.0 version has a lot of student service features and when the self service feature is turned on, an example of accepting a financial aid award notification can be found at: Home> SA Self Service > Learner Services > Finances> Accept/Decline Financial aid.
Dale Gehring, Robin Holden, Diane Christensen, and Lynn Aaberg agreed to serve on a committee to review various self-service (enhancement) options and determine if they are feasible. They are to report back to the full group at our next meeting.

Jeanne stated that meeting financial aid regulations versus PS enhancements should be our number one priority.

Help Tickets
The group felt that sharing financial aid help ticket with the group along with the responses (Q & A) was very helpful. This, in and of itself, serves as a training tool.

System Performance
Scott Mahar reported, as a result of a recent student administration audit, there are several security violations under review, i.e., particularly relative to social security numbers and date of birth appearing on screens. Scott also reported Oracle will be reviewing each campuses functional set-up in the near future. This process will be done by phone. He also mentioned that each campuses personal portfolio page would soon bear their specific campus logo.

Scott and Dennis stated that there are many things that can slow down system performance, including who has access to the various screens. All were encouraged to run a new query which shows who, on each campus, has access to what screens, and re-evaluate the need for that access. Dennis indicated each campuses security officer can remove a person’s security role. The number of screens and permissions, per role, has an impact on system performance. A role is made up of several permissions, i.e., use, inquiry, set-up.

It was the consensus of the group to make it a priority to bring up set-up screens as inquiry only.

Pell EFC Discrepancy
Concern was expressed relative to ISIR EFC discrepancies, such as, what ISIR’s have loaded or suspended. All were encouraged to review Sue’s e-mail relative to this issue. Dennis and Sue recommend unchecking the ‘calc fed tax student and calc fed tax parent’ boxes and to re-run the process.

SAP
Dennis shared with the group the most recent changes described in the NDUS Financial Aid Satisfactory Academic Progress October 2, 2006, draft document. The version of SAP for 0710 has the following changes: 1) process now evaluates by career; 2) the post process is changed so that after the initial post has been run, checklists only get assigned if they are different from an already assigned checklist; and 3) the post process is changed to not only set SAP Indicator on current year Packaging Status Summary, but to also set the indicator on any future year Packaging Status Summary.
It was the consensus to hold off on prioritizing the suggested changes (enhancements) to SAP as listed in the October 2, 2006, draft document on page 14, item 6 (a-r) until after all have tested again. Once SAP testing is complete, regional training (possibly at Grand Forks, Minot, or Devils Lake) will occur.

Scott mentioned that HECN has done the basic set-up for grad audit for the top 25 schools. He reported the basic functionality is there, but there is a lot more to do. Scott suggested that we should invite Mary Bergstrom to come and talk to our group about advising transcripts.

**PS Happenings**

Bonnie Neas shared with the group that:

- SAP continues to be a hot button issue (exploring where we are at and what investments can we make).
- A recent health-check was performed by Oracle and reports received back were good.
- She and Randal met with our state partners on 10-2-06 and it was stated that disk storage continues to impact response time, micro-data base doesn’t handle peak times, and disk storage continues to be a priority.
- There are real challenges with customizing programming, i.e., HR is testing upgrades locally and centrally; then finance upgrades will occur by spring/summer; followed by the student records upgrades. Oracle will be dropping 8.0 support by June 30, 2008.
- System performance is stable.
- Records personnel will be meeting in Bismarck on October 19 to discuss issues with 3rd week enrollment reporting. The SBHE recently made changes (August 2006) to enrollment reporting requirements. Unfortunately, this was too late for programmers to implemented changes for this year.
- She greatly appreciated everyone’s willingness to trouble shoot the System the past couple of weeks.
- Once the system is stabilized, enhancements, i.e., data warehouse, future solutions, CRM for admissions are being discussed.

The group expressed a continued concern on how the collaborative process is working and asked if any thought was been given to doing a cost analysis of the collaborative process in comparison to its benefits. The biggest concern for the financial aid community is ensuring all reporting processes and SAP are being met. Bonnie indicated that she had shared the campuses concerns (as a result of her campus visits) with Dr. Hillman relative to the transfer of credits among campuses and institutional gpa calculations. Bonnie suggested and Dale Gehring agreed to put together 5 - 6 high-level financial aid concerns relative to the collaborative process and bring those forward to the AAC council.
Student Loans of ND

Julie Kubisiak and Holly Schirado updated (informed) the group about:

- Reallocations.
- Change/send response time.
- Refund reversals.
- Change and response files.
- Error reports. Asked what’s needed
- Unique ID’s missing and corrected.
- DEAL loans (app/send).
- Holly will check with Wally on addresses (permanent versus mailing). Julie indicated that obtaining and maintaining good addresses is a real challenge for SLND and is even more critical once a student graduates. Julie stated it is a shared responsibility to maintain good address for students who particularly graduated because if the student defaults, it has an adverse effect on the post-secondary school. Julie asked how long our system maintains e-mail address for students who graduated from a NDUS institution? (CHECK ON)
- Holly will explore the benefits of using a temporary address for mailing purposes versus permanent address.
- Timing issues relative to disbursement files.

It was the consensus of the group that the Inbound loan processing process change from 10 a.m. each day to 9:30 a.m. effective October 5, 2006. This change was suggested to try to pick up the majority of the loans processed by SLND. Holly reported that most of the processing at their end is complete by 9 a.m. each day.

Jeff asked Julie if SLND is interested in exploring a state student loan program, similar to Minnesota’s SELF Loan. Jeff indicated more and more students are finding it extremely difficult to attend college because of increased costs and limited affordable financial aid options. Julie asked for more specific. She indicated the Bank is in the process of preparing their 2007-09 priorities. She reminded the group that the Bank is tapped for $60 million each biennium to help with the State’s general fund needs. Julie urged the directors to visit and inform their presidents about this request as it could compete with the $60 million the Bank is already asked to contribute to the general fund. Some suggestions provided were: buy-down the interest rate on the DEAL loan (North Dakota’s alternative student loan option), remove the guarantee component on the DEAL Loan (what risks does this have), lower the interest rate of the DEAL loan. Julie will be doing some cost analysis of these ideas.

Set-up issues:
Dennis asked the group if they have done summer set-up yet and, if not, encouraged the group to consider doing summer set-up before roll-overs (by January – February) as this would save them time in the long run. Dennis reminded all to use the copy feature whenever possible (disbursement rule/financial aid item types). Dennis indicated he would update all the Stafford Loan amounts for all schools.
A concern was expressed relative to students (via the portal) being able to see campus comments being made to their file in PS. Dennis will check on this.

Miscellaneous items:
The group asked if there was a way to work with the high schools to self-identify (stamp) on a student’s high school transcript that the student has met all the NDUS rigorous curriculum requirements. Peggy will visit with Dr. Hillman and Julie Schepp about this. This feature would be beneficial when reviewing a student’s file for ACG eligibility.

Katie informed the group that North Dakota has received a grant from College Goal Sunday and a planning committee is working towards offering North Dakota’s first College Goal Sunday in January 2008.

Jeanne apprised the group of the implementation of a one-stop shop their institutions in putting in place. Their campus visited the U of MN and Mankato as these institutions currently have the process. Jeanne reported that NDSU is presently doing some remodeling in the Student Union to accommodate a One-Stop Shop for students needing assistance with such functions as business office (cashier), records, financial aid, Bison Card, parking, etc., issues. Jeanne indicated since all these offices are currently spread out on their campus, the one-stop idea should be well received by students and parents. It is being funded through a one-time technology fee.

The next CUSAD/FUG meeting will be via conference call in late-November. Shelley will survey the group for agenda items.

Meeting adjourned.

Prepared by:
Peggy Wipf