CUSAD Minutes
November 30, 2006

Participants:
Lynn Aaberg, Lynn Haverlock, WSC; Robin Holden, Sara Brown, Lisa Earls, Rohit Kulkarni, UND; Katie Nettell, LRSC; Betty Schumacher, VCSU; Jeanne Enebo, NDSU; Christopher Meek, Stephanie Suko, DSU; Dale Gehringer, MiSU; Diane Christenson, MiSU-Bottineau Campus; Shirley Hanson, MaSU; Shelley Blome, NDSCS; Sue Applegren, Dennis Junk, HECN; Peggy Wipf, NDUS

SAP Testing Results
Dennis informed the group that HECN is still testing a number of SAP related items in “T” as a result of the November 17 (Minot meeting) & 20 (Grand Forks meeting), 2006, regional SAP testing that was done by the financial aid community. He said he hopes to have everything rolled out to “Q” early next week, if not this week, so that all can test some more. He indicated that as a result of the November 17 & 20, 2006, SAP testing comments, the programmer has been able to look at some of those and fix them and some are only for discussion. Shelley shared the following discussion issues that resulted from the directors November 17, 2006, SAP testing meeting:

November 17, 2006:
1. Is it a problem if a student is skipped because of no enrollment for their manual override to get reset? This could be a problem for spring overrides where the student doesn’t attend summer; all the overrides will be reset when summer is run, so the list is no longer available. Procedural issue?

Dennis informed the group that HECN has done some exploring and the service indicator is going to remain out there until it is taken off. So if the student is not attending in the summer, the student would not be evaluated, in which case the service indicator would stay. Sarah made the point that there would be no historical data for that student if an appeal had to be processed after the term of enrollment. It would be lost after the next run of the process. Dennis stated that one of the items on our wish list in SAP is historical data.

2. Currently, our system uses “Residence Terms” (see FA Term, Statistics Tab) as determined by Student Records to determine how many terms a student has attended (for use in determining compliance with GPA standards). At least one school feels that we should calculate term to exclude terms where student was collaborative or a HS student taking college credit. Another campus felt we should be using total terms so transfer students don’t get evaluated as first term students. This needs a user group determination.

Dennis stated that which ever way SAP is calculated, either using transfer credits or only credits earned at an institution, HECN needs to know whether or not the group recommends that the calculation of SAP should include only those terms that a student attended your institution, or terms earned at other institutions and transferred into the degree-granting institution included in the calculation. After
much discussion, it was the consensus of the group to calculate SAP only using
the resident term credits earned at the degree granting institution.

November 20, 2006:
  1. “Program Not Setup” showing on both Exception list and Not Evaluated list.
     Should it only be on one list? It was the consensus of the group for SAP
calculation purposes to maintain both the exception report (a list of students at
their institution that all agree their campus wants to look each time) and the skip
report (a historical list that a campus can go back to later and say that is the reason
this student was not evaluated).

  2. Should “Student in Ineligible Program” be listed on the not evaluated list only? It
     was the consensus of the group to leave students enrolled in ineligible program on
the exception report.

The SAP progress discussion was tabled until further testing, including posting, can
occur.

Checklists
It was the consensus of the group to approve UND’s request for three new checklists.
One is for a new federal loan program, i.e., Nurse Faculty Loan. The loan is campus-
based and it is similar to the Perkins and the Nursing Loan, except that it requires
entrance loan counseling every year. Dennis shared with the group that there is very little
time involved in the development of the checklists. He did apprise the group, however,
that the items for checklists are global and every time a checklist is being set-up the
whole group needs to be made aware of it. The second checklist, an institutional one for
monitoring a pathology loan and the third checklist, also an institutional one, is to help
monitor correspondence students.

Common Data Sets
Dennis informed the group that in the course of testing of common data set dump (for the
academic year of academic budgets and awards for students at an institution in the fall; as
common data set reporting requires) a couple of schools have asked for additional
information and Dennis wanted to get a feel from the group if these changes would be
best for everyone. One institution wants the information by student and one wants it by
item type. Dennis wanted to get a feel of how most directors would like their information
sorted so HECN can get that additional information out there for those who want to do
additional testing. The institutions requested that Dennis forward the code, that is, the
documentation of where information for the process is being pull from, to the group in
order for them to make more informed decisions on this topic. Dennis will be requesting
Chad Gilbertson to do pseudo code to see if this may clear-up some unanswered
questions. Dennis will let the group know when this item is ready for additional testing.

Protocol for Testing
Shelley began the discussion by asking the group what a reasonable timetable is for
testing and stressed the importance of actually doing it and reporting the results to HECN
so that corrections and/or changes can be made before moving a request from the Test environment to the Production environment. Once HECN sends out a message that a requested item is in the test mode, they need to know from all that whatever was requested and is in test is working the way it was requested to work. Shelley mentioned this our system and each school needs to test as there could be different results picked up. HECN indicated they struggle with only one or two schools testing and responding before moving it to production. Is that enough of a sample to move a request forward into the production environment? HECN strongly encouraged that at least one user from each school needs to make a commitment to test each time because when HECN does copy-overs, whatever was in the Q environment and they end up re-migrating and re-migrating. HECN suggested that the users decide what an appropriate timetable is for testing. Rohit suggested that maybe it would be appropriate for HECN to tie testing turnaround time on a case-by-case basis as some testing takes longer than others. Lynn suggested a web page be developed that would list all the jobs that are open to be tested, what priority they have, along with a list of how many schools have actually tested that item. HECN will work on developing such a page that includes: the project, deadline, and numbers who have tested it to date and will link every e-mail request for testing they send to this project page. Dennis reminded us that with the testing of self-service, a committee was formed to test and are to report their findings. It was asked if this a better model? Sue reminded the group that the things HECN is requesting be tested is a result of the groups request for change. So in essence, it will make the financial aid offices task a lot easier in the future. Rohit also recommended that it would be beneficial to have a technical person and/or programmer available when groups are testing to answer questions as to where certain information is being pulled from.

After much discussion, it was recommended to use the select sub-group approach to do the actual testing; not that any or every campus can’t be there, but that the primary testing be done by the assigned sub-group and that a programmer be assigned to the sub-group to help identify what the programs are looking at. HECN will send out a cumulative list of what is to be tested now and will ask for individuals to volunteer for testing. All were reminded that their offices have many talented individuals who certainly can do the testing and it does not always need to be the director.

Short Inquiry Role
Robin apprised the group that at the meeting in Wahpeton, we talked about the two inquiry roles and said she volunteered to do some surveying on her campus of people who have the financial aid inquiry role, the ones not in the financial aid office. She said what came back was that they were using primarily four different screens: package and disburse – Inquire 1- authorizations and disbursements and also under Inquire 1 – award summary screen, and they were also using the package and disburse – Inquire 2 - financial aid status screens and process loans –Inquire 1- loan application summary. UND recommended that these screens be made available as inquiry screens. All agreed.

Dennis reminded the group that when the bundle goes in on December 2, 2006, every one needs to be mindful that every Return of Title IV worksheet and tracking that has been done up to this point will be in historical data and there will be new screens where the
current ones are. They have HERA in the title that will include the ACG and SMART grant in their calculations and will be in the package and disburse aid menu. For the remainder of the year, you will need to go to two places to track Return of Title IV funds.

**State Grant Study**
It was moved by Betty and seconded by Shelley to accept the State Grant Program study conclusions and NDUS staff recommendations. Betty did mention that information on the ACG and SMART grant programs may be helpful future information to add to the report as the two programs mature. All voted aye.

**Verification**
Jeanne requested an addition to the verification letter to include schedule SE when the letter is sent out asking for the Schedules C and F. Dennis stated there was minimal work involved to make this change. All voted aye.

Meeting adjourned.

Minutes prepared by:
Peggy Wipf