CUSAD/Financial Aid FUG
Minutes
November 20, 2007
Meeting held during Round 1 of Testing for 9.0
Grand Forks, North Dakota

Present: Jeff Jacobs, BSC; Sandy Klein (by phone), DSU; Katie Nettell, LRSC; Shirley Hanson, MaSU; Dale Gehring, MiSU; Diane Christenson, MiSU-Bottineau; Carmon Marohl, NDSCS; Jeanne Enebo, NDSU; Robin Holden, UND; Betty Schumacher, VCSU; Lynn Aaberg, WSC; Sue Applegren, Dennis Junk, Campus Solutions

Katie Nettell called the meeting to order at 9:10 a.m.

**Service Indicators for Ability to Benefit Test (Jeff Jacobs)** – BSC has a need to prevent packaging for students who do not meet ATB requirements. The possibility of using a negative service indicator was discussed. Dennis noted that there is not capability to apply a negative impact on financial aid functions through indicators. Suggestions such as using the FA Disbursement Hold in Packaging Status Summary or using checklists to identify and track ATB were made. A motion (Jeff) to create a service indicator was seconded (Robin) and approved.

Quick reminder – Checklists for this round of testing can be faxed to Campus Solutions before November 30.

**Common Dates (Lynn Aaberg)** – The Common Calendar Workgroup has been discussing common academic dates and has submitted the recommendation of using 11 calendar days from the day of registration as the last day to add a class/drop a class with no notation. If approved the date would be implemented fall 2008. The recommendation has been taken to the necessary councils and has not met with any resistance. It has also been discussed by the Cabinet. It was suggested that any concerns should be taken to campus Presidents at this point.

This same group is beginning the more difficult discussions on common fee payment dates in relation to 3rd week enrollment. Five possible suggestions from the workgroup were reviewed. Discussion followed and a suggestion was made that fee payment and the 3rd week count should not be connected. Jeff noted that the program structure at BSC results in a higher enrollment at the end of the term and they are collecting fees throughout the term. It was suggested that the concept of a paid student being a real student should no longer be the measure. Another comment related the bad customer service that occurs in the current process of withdrawing students for non-payment and then re-enrolling them when arrangements are made. A suggestion made was to take a snapshot of enrollment throughout the semester. These comments and suggestions will be forwarded to the workgroup.

**Collaborative Procedure (Lynn Aaberg)** – The latest Collaborative Student Draft Procedure, dated November 13, 2007 had been attached to this meetings agenda and sent to the group previously for review. Lynn asked for comments and suggestions that would be forwarded to the group formulating the document. Discussion began with the comment that the deadline to become collaborative should be earlier than the 100% refund date to allow for the additional administrative work that is necessary before credits are locked for financial aid processing. Several agreed that more administrative time is needed.
Dale commented on the procedure, focusing on the first paragraph, and how it would apply to shared remedial courses from MiSU-Bottineau to MiSU. There may be concerns that their academic personnel may be more familiar with.

In regards to item 2 under Registration, one commented that the requirement to enroll in, at least, one course at the home institution should apply to all terms. An individual approval procedure could be used to allow otherwise.

In regards to item 7 under Billing/charges, it was suggested that it be worded as follows: It is the home institution’s responsibility to collect from the student any financial aid paid back to the federal government that exceeds the institutional refund. This occurs when it is determined a student has officially or unofficially withdrawn resulting in a Return of Title IV calculation.

ACG/SMART (Dennis Junk) – Dennis inquired to see if all schools were using the process now available in PeopleSoft and if it was working. General questions were answered. He noted that the process will be the same in 9.0. He will be sending information soon about processing ACG/SMART for spring semester.

2008-09 Miscellaneous COA Allowance (Robin Holden) – Robin reported that API is between 2% and 4% and recommends that the miscellaneous budget be increased to $3,120, a 2% increase. A motion (Jeff) to allow up to $3,100 miscellaneous budget for 2008-2009 was seconded (Betty) and approved.

2008-09 Books & Supplies COA Allowance (Lynn Aaberg) – Lynn reported information from a report from the Advisory Committee on Student Financial Assistance that the cost of books today could approach $700 to $1,000 and recommended that the current budget amount of $900 could remain. A motion (Jeanne) to allow up to $900 as a books and supply allowance for 2008-2009 was seconded (Betty) and approved.

Review Functional DR Priority List (Dale Gehring) – Dale has requested development requests for a query for those who met deadline with remaining need to assist with reawarding CB aid. A request to revise the NDU Fed Work Study Earnings Report to include two item types is also open. We were reminded that no additional work on these requests will occur until the upgrade to 9.0 is complete. Jeff suggested that priority should be to make sure our current queries are in working order for upgrade to 9.0. Dennis will inform us when we can begin to prioritize development requests for work needed in 9.0.

A request from UND to revise the SAP process was discussed as a compliance issue. Currently W grades without a date/time stamp are not being counted in the SAP calculation as a result of incorrect historical data. The request is to create a fix so that a field that has been identified by Lisa at UND be used when evaluating W grades without a date stamp. UND has over 1100 students that are affected by this problem. In discussion Jeff mentioned that there are complexity issue groups for Academic Standing, GPA and SAP that will be meeting together soon. He listed Robin, Sandy, Katie, Lynn and himself as participating in that group and that these issues need to be resolved before the upgrade to 9.0. A suggestion was made that we may be at a point where a consultant specializing in SAP be involved with our process. Dennis commented that we should first be reviewing the new delivered product in 9.0 and that will be possible during the next round.
of testing. It was questioned whether this issue should go to the complexity issue group to resolve for use in spring semester. After discussion, a motion (Robin) to begin a fix to be completed as soon as possible was seconded (Diane) and approved. It was noted that this action would be requesting an override on the ban on development requests.

**Grad Plus Loan Counseling tracking and queries implementation** – Discussion on this topic began the previous day as part of testing. There is a new procedure in 9.0 to track loan counseling including Grad Plus. A decision needs to be made if we want to move to the new process which no longer checks NSLDS information as it requires global setup. It was suggested we be able to use the new process but with the option of being able to better define students in some way. Dennis noted that this could be possible in the next round of testing in January. It was then agreed that this decision be delayed until after testing in January.

**User Edit Message** – Katie reported on her use of the User Edit Message to assist in holding disbursements of Pell Grant for students who have a later census date at LRSC. She found that using the fed aid hold in Packaging Status Summary kept those amounts from showing up as anticipated aid which created problems. Dennis noted that setup to use this message has to be done by Campus Solutions and offered to do that for all campuses if we agreed. The group agreed to have the setup completed. Dennis will send out direction when setup is complete.

**Other** – Sandy asked if wording on Right to Rescind letters can be changed. It was noted that we are able to change our own wording on the letter templates.

Discussion began on the process of query writing and if there have been any improvements in the process of making private queries available as public queries. Rohit noted that the query writer can transfer a written query to another query writer (at another campus) but only query writers can run the query. It was noted that there is a current process to make a private query global. There is query writing training coming up on December 3rd and 4th for a cost of $800-$900. Rich Lehn can be contacted if interested in attending the training. It was questioned if it was possible to ask for access to run available queries without having access as a writer. Katie noted that she will bring this question to Mary Bergstrom who is the leader of the query writer group.

A motion (Jeanne) to adjourn was seconded (Robin) and approved.

Respectfully submitted,

Lynn Aaberg, WSC