CUSAD Minutes
Tuesday, December 11, 2012
Radisson Hotel, Bismarck

Present:
- Betty Schumacher, Chair, VCSU
- Jeff Jacobs, BSC
- Valerie Heilman, DCB
- Sandy Klein, DSU
- Katie Nettell, LRSC
- Shirley Hanson, MaSU
- Dale Gehring and Laurie Weber, MiSU
- Shelley Blome and Carmen Marohl, NDSCS
- Jeanne Enebo and Bonnie Litton, NDSU
- Janelle Kilgore UND
- Erica Renville, WSC
- Dennis Junk and Sue Applegren, Campus Solutions
- Gina Padilla, Bill Eggert, and Sheila Tibke, NDUS

Betty called the meeting to order at 8 a.m.

Approval of November 15, 2012, CUSAD Minutes
It was moved by Jeanne and seconded by Shelley to approve the November 15, 2012, CUSAD minutes as presented. The motion was unanimously approved.

Additions to Agenda
Jeanne would like to discuss the Pell declamation statement.

2013-14 Transportation Costs
Dennis passed out a template of the financial aid shopping sheet, and noted that transportation costs are listed in a separate category under the cost of attendance. He said CUSAD needs to decide if there will be one amount for everybody or different costs for various categories created by the Federal government. Dennis added that the shopping sheet needs to be implemented for the next aid year (2013-14), and he should have it set up by early March. These shopping sheets will be individualized for each student and students will be able to print them. Campuses are required to provide students a link where they can find this information. Dennis will provide information at a later date on setting up the item codes.

COA and Differential Tuition Rates
Jeanne reported NDSU has already implemented the new tuition structure for engineering and is working on the tuition structure for business. She said NDSU left the base tuition, set up differential tuition, and then combined them. She said she has the budget items set up, but would like to be able to use budget formulas. Janelle indicated UND has some programs set up for this year. MiSU stated that they have a situation with their Grow ND program in that
currently all students get charged ND tuition. With the new tuition structure, those students currently enrolled will be grandfathered in until 2017, so MiSU may have to create student groups to separate currently enrolled students from the new students. Jeanne indicated she just wanted to provide a heads up to the issues they’ve encountered when setting up these budgets.

Books/Miscellaneous Expenses for 2013-14
Janelle said UND is surveying their students asking how much their books cost, but doesn’t have the results yet. It was moved by Dale and seconded by Val to use the CIP index for misc. expenses. The motion was unanimously approved. Gina will look this up and send the information to the campuses. Katie moved and Sandy seconded to set book budget at $1,000, with flexibility for each campus. The motion was unanimously approved.

One Term Only Awarding
Jeff asked if any campus is using the process that’s in place to award one term only automatically. Val said DCB uses it and page 13 of the desk reference has information on one term awarding. Shelley added that if you have student tracker you are able to see where/when students have attended or are attending college. She added that NDSCS is just implementing it and admissions will check the student tracker and add the necessary items to the student’s check list.

AY Rollover for 2014 and Scheduling of FA Term for 2014
Dennis said he would like to do aid year rollover Jan. 2 or 3. Following discussion, it was the consensus of the group that Dennis does rollover on Jan. 12. Dennis then asked when the campuses want to do 2013-14 aid and said that bundle for verification usually goes into production the first part of March. It was the consensus of the group to do FA term build on Feb. 15. Dennis added that campuses need to make sure they have the correct amounts and dates entered prior to that time to avoid running into issues down the road. Dennis said he is waiting for the wording from the feds before calling a meeting of the group to work on the verification letter.

Aid Year Rollover
Jeff said Dennis’ discussion above addressed his questions.

Comm Gen Process
Janelle said an NDSU student received a Comm Gen letter even though they hadn’t had a change to their information since Sept. Sue said in that particular instance a student made a change and then went back to self-service and reinstated the original info, which is what prompted the letter to be sent. Sue added that this was a unique instance.

DR Revision for Query NDU_FA_0034_7
Jeanne asked if NDU_FA_0034_7 could indicate the term the student earned the grade. It was moved by Jeanne and seconded by Janelle to change the query to add a column to indicate the
term when the student took the course and received the grade. The motion was unanimously approved with a ranking of high priority.

**Announcements**
Dale announced that he is retiring at the end of 2012, and Laurie will be replacing him as financial aid director at MiSU effective Jan. 1, 2013.

Sue announced that Diane Peterson resigned.

**Review Action Item List**
CUSAD members reviewed and discussed items on the action item list and found that several of the items are complete, and will be marked as such. Some of the items discussed:

- **State Grant Program.** Several campuses expressed concern about the NDUS awarding students a grant and then the campus needs to pull it due to no need. Val talked about the Passport Program where the student is enrolled at DCB but are attending another campus where expenses are higher. Gina explained the new program she is working on with Dennis should address these issues, and they will be discussed at a future CUSAD meeting before forwarding the recommendations to the SGAB for consideration.

- **LDA (last date of attendance).** Shirley said student records has yet to discuss this issue. Katie said there is a DR in PeopleSoft that faculty can use, but the faculty first need to get access in PeopleSoft.

- **Val asked if a query could be set up for all campuses to track attendance at all campuses since not all campuses have query writers. Shelley agreed.**

- **Collaborative/consortium agreements.** Katie said she received questions from the auditors about consortium agreements between institutions. Katie will forward the e-mail to CUSAD members. Katie said most of the things LRSC does is under the collaborative agreement signed by all NDUS financial aid directors. Janelle said she sent e-mail to the Mark (auditor) addressing this same question. Jeff suggested the collaborative agreement and procedure be reviewed again, as it is outdated since it doesn’t reference repeated course work or which school is reporting credits to clearinghouse. Gina said she would contact Amy regarding changes to the procedure and to request that a representative from financial aid serve on the committee reviewing the procedure changes.

**Fraud Service Indicator**
Katie distributed a draft procedure for the financial aid global service indicator. Bill Eggert, NDUS director of internal audit and risk assessment, attended this portion of the meeting. He said FERPA requirements have been reviewed and discussed with legal counsel and shouldn’t be a problem. Bill said he believes the procedure is ready to go forward. Katie suggested this
be a high priority. Shelley suggested an address survey be done once or twice a year. Bill said he can check addresses with software from the attorney general’s office. Dennis said he will proceed with setting up steps 1 & 2 of the procedure and recommend to SITS they grant campuses security. Bill or Gina will check with Cynthia Wagner Goulet, NDUS assistant general counsel, if a SBHE policy or NDUS procedure is needed.

It was moved by Katie and seconded by Shelley to accept the draft procedure, to ask campus solutions to set up service indicators for steps 1 & 2, and to ask campus solutions programmers to set up security roles. The motion was approved unanimously with a high priority.

**Wish List**
Dennis said there are a lot of requests on the wish list from CUSAD. He asked the group if, since some of the requests are old and nonissues anymore, if the list could be scrapped and a new list started. He said he and his staff would concentrate on working on issues now at hand and not something that was an issue from the past. It was moved by Shelley and seconded by Dale to ignore the wish list and start new. The motion was approved unanimously.

**History Files**
Dennis said he has been asked that admissions, student finance, and student records all do a data dump at 4th week and again close to the end of each term. He said if the code hasn’t changed, the report will always be the same. Dennis added that campuses need to check the history box when requesting the report for IPEDS.

**Common Data Set**
Dennis reported the common data set has been run for last year, and asked if anyone has run it for the current year. He said that for last year, its historical data and for the current year it is actual data that will change every week and should be considered a projection.

**Assistance Questions**
Erica asked if any campus withholds transcripts if students do not complete verification. Several campuses responded that they do not.

**Pell Declamation Statement**
Jeanne asked if any campus has a statement for students to sign if they want to decline the Pell Grant. It was suggested a statement be put on the website notifying students they have a right to decline this aid.

**Old Business**

**CUSAD Meeting Schedule**
It was agreed that the group would keep its current schedule of meeting face-to-face twice a year, and that the remaining meetings be held the third Thursday of each month from 1:30 to 3:30.
COA, Unofficial Withdrawals – Discussion with SR, and Pell Graduation Rate Disclosure
These issues were discussed when reviewing the action item list.

It was moved by Katie and seconded by Dale to adjourn. The motion was unanimously approved.

The meeting adjourned at 2:43 p.m.

Minutes prepared by
Sheila Tibke