Janelle Kilgore called the meeting to order at 1:31 pm.

APPROVAL of December 19, 2013 CUSAD MINUTES
Katie moved to approve minutes without changes; seconded by Laurie. The motion was unanimously approved.

Jeff suggested that going forward, CUSAD could use passive agreement to approve minutes as RMASFAA does. Once the minutes have been sent to the group, if there are no changes, the minutes are considered approved. The method saves time. The CUSAD members agreed to move forward with passive approval of minutes.

ADDITIONS TO AGENDA
None.

NEW BUSINESS
1. Clarification of Jan 22nd – 2015 C-Code Communications Email – Sandy Klein
   A checklist has been created to send communications to students with C-codes on their ISIRS. It is currently in discussion in committee. UND is using the checklist and it is working. It provides students and families with information in a timelier manner. The contact person at UND is Cassandra McDonald if people have questions as to its usage. Jeff requested that the email related to the C-Code communications be sent again. Laurie suggested that there be two different letters—one which is purely informational and one which requires action. Sue indicated that there are templates which can be customized to the school and/or wording can be changed on any of the checklist items.

2. NDU Unearned Failing Grades Report – Janelle Kilgore
   One of Janelle’s staff members wondered if there could be a query that would combine certain reports. For instance, if a student has any of the FNN, UN, UNN, etc. that initially pulls students for the report, one would want to see that student’s other grades as well. Perhaps the semester GPA could be added to the report also. Janelle suggested that a small working group be organized to study incorporating such items as collaborative courses, modular courses and drops, etc. All queries and parameters are already accessible and there may be
one that can be tweaked for this purpose. It would also be helpful if the report showed if a student was in a first 8 week or last 8 week course and it was dropped or failed. Dennis will send an email and suggest getting together after the next 2 weeks are over or thereabouts. Schools volunteering for the working group are BSC, UND (Becky Lucke), NDSU and NDSCS (Sheila).

3. **FA Item Types Need Check Box – Jeff Jacobs**
   Whether or not to check the need based box is ultimately determined by each school’s policies. Different schools set these up differently. However, Jeff found that the unsubsidized loan need based box needs to be unchecked to work properly at BSC. The group agreed that the TEACH Grant would also be unchecked.

   Jeff felt that the Aid Year Rollover document [attached to minutes] is very confusing to the user, specifically with regard to #3. He felt that the checklist doesn’t coincide with other information and suggested identifying the specific checklist item. Jeff wanted to know if the directors are supposed to do something with #3b (completing old C-Code Checklists). Sue explained that if this isn’t addressed, the 2015 checklist could pick up unclosed checklist items from prior ‘odd years’. It is, however, a non-issue right now and Sue will give more specific instructions in the next process.

As a result of this discussion and many questions, it was determined that a general training session is in order. Bundle 32 will be installed in production on March 1. ISIRs can be loaded now but nothing can be done with them until the new bundle is ready to use. Training could be done ‘in stage’ the week before March 1. However, most prefer to set up ‘in production’ so they don’t have to go through the process twice. C-codes and verification will also be reviewed at the same training. Training is tentatively set for the week of March 4th.

There is a training room available now at the NDUS Core Technology Services new site in Grand Forks. Dennis will organize training session.

5. **Exit Counseling Process – Betty Schumacher**
   Because the exit counseling process is not working in Campus Connection, Betty asked what others are doing to fulfil this requirement. UND does use Campus Connection. VCSU is getting students who were still enrolled as well as some long gone. There are also gaps with remote or collaborative courses. There is a group working on this and Dennis said that most problems have been corrected so the process may just need to be refreshed. The group can be reconvened after the system is refreshed, if necessary.

6. **Self Service Pop up Notification DR for New Communications – Katie Nettell**
   Katie brought to the Campus Community Group the possibility of the self-service pop up notification that CUSAD had begun discussing at the last meeting. The group felt that it had merit. To go further, it would have to have a Development Request (DR) written. Dennis will work with Katie on writing the DR. Other questions arose such as: when students check into the system the first time, do they get a pop-up? If a student ‘opts out’, how do we find out? FA can use queries NDUFA 0197, NDUFA 0197-1 to find them. If student’s aid has already disbursed, nothing can be done. UND has a paper form to allow students to opt back in. Janelle will share the form with others.

7. **Aid Year Rollover Email – Sue Applegren**
   Since a training session is being organized, this agenda item is waived.

8. **Communications – Dennis Junk**
   Several years ago, Lynn Aaberg suggested that there should be a notice of some kind every time a procedure, report, etc. was updated by Campus Solutions, particularly documents on the web. Dennis requested input as to whether FA administrators still want to be notified every time something has been changed or updated. Would people prefer notices sent once/week, once/month or as it happens? Laurie suggested that perhaps a weekly
digest form would work. Sandy K., Katie, Sandy P. and Jeff would favor ‘as it happens’ and felt this would be easier for Dennis and Sue as well. A request was made to use specific codes to help identify updates and to create the ability to file according to topic.

OLD BUSINESS

1. Action Items Review
   None reviewed. Janelle and Marge plan to meet before next meeting to review the action items.

2. Last date of attendance for unofficial withdrawals – Jeff Jacobs
   Jeff reinforced that, as noted in the December 19, 2013, CUSAD minutes, enrollment reporting through NSLDS needs to be updated for all unofficial withdrawals. He also reinforced that it needs to be done on NSLDS and probably most appropriately by financial aid personnel directly on NSLDS. This is not a new requirement, but rather something of which to be aware. Jeanne suggests pulling the NSLDS handbook for instructions. There are certain codes in the handbook to use for updating last date of attendance. There are two steps to each update: (1) initial reporting and (2) confirmation. Also per Jeanne, the handbook says to use the last date of attendance which does not have to be the same as Return to Title IV documentation.

3. Other
   National Student Clearinghouse Notice Betty asked if anyone had opened the most recent PowerPoint from NS Clearinghouse. She indicated that collaborative enrollment practices may be impacted. Most had not yet seen the email. Dennis said that some of the necessary changes related to Betty’s question will be coming out with the bundle. It will be a ‘critical fix’ and there will be some work needed on ‘our side’ as well.

   Global Service Indicator Katie encouraged all to test the GSI in stage. Although Shelley, Val and Katie tested it initially, everyone has authority to test in stage now. Dennis will send out script to group for testing.

MEETING ADJOURNED
The next meeting is tentatively set for February 20. The meeting was adjourned at 2:50 pm.

Minutes prepared by Marge Michael, NDUS
Sent to SIS Financial Aid Directors on January 13, 2014:

**Aid Year Rollover**

**2014-2015**

1. Aid Year rollover has been completed by Campus Solutions and the capability to load 2015 ISIRs is enabled, 2013 has been inactivated. Note that we will not receive the capability to do verification or create corrected ISIRs until late February or sometime in March.
   a. We won’t be able to calculate new EFCs until approximately mid-March.
   b. Until that time, however, you will be able to begin the verification process for loaded ISIRs.
   c. Initially, ISIRs need to be loaded with the calculation instructions set to “Store INAS Calc Request;” later we will advise you when to change the setting.

2. Campus Solutions has done the following, but it would be good for you to review it:
   a. **Set Up SACR > Product Related > Financial Aid > File Management > ISIR Data LoadParms:** Complete the following before loading any ISIRs:
      i. On Tab 1, Load INAS Data section, ensure “Call INAS” is unchecked.
      ii. On Tab 3, ensure INAS Call Options section, is initially set to “Store INAS Calc Request”.
      iii. On tab 3, if “Suspend Student Initiated” is checked, we unchecked it.

3. Here are some things you’ll need to do right away:
   a. Please note the following concerning verification letters:
      i. Before you run letters the first time, you should run the process to complete old checklists from 2013 (**NDU Applications > NDU Financial Aid > Process > NDU Verification Chklst Comptn**).
      ii. For odd years use new letters _L9 (Verification, Initial Letter) or _M9 (Verification, Initial E-mail).
      iii. For even year you’ll continue to use letters _L8 (Verification, Initial Letter) or _M8 (Verification, Initial E-mail).
   b. Consider using **NDU Applications > NDU Financial Aid > Process > NDU Verification Chklst Comptn** to complete old C-Code Checklists.
   c. **You will need to update dates.** This step needs to be completed before we run FA Term Build the first time for 2014 in mid February. The roll-over program tries to guess what dates you want to use, but it is only guessing and doesn’t do a particularly good job:
      i. **Set Up SACR > Product Related > Financial Aid > Financial Aid Term > Setup FA Term:** Insert Census Dates. Recommend you follow the three day model when establishing your dates. Because of the common last day to add classes date, there is not enough available processing time to use the two day model:
         1. Day 1: Last day to add classes. (3 Sep 2014, 22 Jan 2015)
         2. Day 2: Starting after 0001 hrs the next day, run the last FA Term build before FA Census
         3. Day 3: FA Census Date (5 Sep 2014, 24 Jan 2015 [Saturday]); FA Load is locked as of the last FA Term build before this date.
ii. Set Up SACR > Product Related > Financial Aid > Awards > Disbursement ID
   Table: Update/confirm Disbursement Date and Loan Request Date on each ID. Students can see this date in Student Center. To preclude questions, you may want to make this date the same as the SF Disbursement date.

iii. Set Up SACR > Product Related > Financial Aid > Aid Year > Valid Terms for Career: Update/confirm Loan Period Start and End date.

iv. Set Up SACR > Product Related > Financial Aid > Disbursement> Setup Disb/Authorization Calendars:
   1. Ensure all terms are listed on both tabs
   2. Update/confirm Disbursement Calendar Cut-Off dates.


vi. Review dates for holidays, and request that Campus Solutions suspend any recurrences that would otherwise run processes on holidays that would send output to COD (Generate Direct Loan Data, Generate Pell Data).

vii. On the COD website. School > Direct Loans> Options. The earliest date that a PLUS application is available defaults to 1 May. Modify as necessary for the new aid year.

4. After the INAS patch is applied, (approximately mid March) complete the following before submitting corrected ISIRs to CPS:
      i. On the first tab, Set INAS Rules Set to "CSS Rules/Values"
      ii. On the first tab, in the “Global” Box, insure:
         1. INAS Data Source is “Federal”.
         2. INAS Calc Type is “FM”.
      iii. On the first tab, in the “Federal” box: UND only needs to check-mark "Calc PC for Independent".
      iv. (Optional) In the FM Budget Durations Link, put a 3 in the Non-Standard box. This will cause summer EFCs to be calculated for all students whenever EFCs are calculated/recalculated.
   b. Set Up SACR > Product Related > Financial Aid > File Management > ISIR Data Load Parms:
      i. On Tab 1, Load INAS Data section, check-mark “Call INAS”
      ii. On Tab 3, INAS Call Options section, change from “Store INAS Calc Request” to “Always Call INAS”
   c. Financial Aid > File Management > INAS Batch Calculation: After completing the above steps, run the INAS Batch Calc process to calculate the EFC on all the ISIRs you have received to date. Your run control should reflect Application Type “F”, and Clear Calc Requests “Y”.
   d. In years the Pell maximum has changed, update the maximum on:
      i. Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types, FA Item Type 4 tab. The amount that goes here is the single term amount (i.e., half the annual maximum amount of 5645, or 2823)
      ii. Set Up SACR > Product Related > Student Financials > Item Types > Item Types, Amount Edits tab.
      iii. Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan, each Packaging Plan, Packaging Rules 1 tab. (Also change the Pell Item Type number if you use different numbers for even and odd years).
5. Complete the following before you begin budgeting and packaging:
   a. **Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types**, If you do not have even year/odd year loan item types:
      i. The 2014 loan item types used before 1 July 2014 need to have a new row added and be updated with even year fees (OPE, RPE or ORE and RFE). Add a row and delete the existing codes using the minus button before adding the new codes.
      ii. Item Types used for late summer 2013 need to have EVEN YEAR codes if the feds make any changes to fees effective 1 July 2013. Add a row and delete the existing codes before adding the new codes.
      iii. Item Types used for late summer 2014 need to have ODD YEAR codes if the feds make any changes to fees effective 1 July 2014. Add a row with the same date as your loan fee changes and delete the existing codes before adding the new codes.
      iv. If you use different project codes on your SF Item Type, add a row and change them now.
   b. **Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan/Repackaging Plan**, if you have even year/odd year item types, update your packaging plans to the ODD year item types.
   c. Set up a **Transportation Category** in your budgets so you will have complete information for your Shopping Sheets. A separate document has been provided with information on how to do that.
   d. **Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options**: Disallow access for the new aid year if you do not want students to see budgets with no awards.
   e. **Set Up SACR > Product Related > Financial Aid > File Management > ISIR Data Load Parms**: Before beginning to package, you may want to check “Suspend Student Initiated”
   f. Verify the information rolled over correctly on the following:
      i. **Set Up SACR > Product Related > Financial Aid > Awards > Loan Fee Setup**: If DL fees have changed, update the fees here.
      ii. **Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types**: If DL fees have changed, assign the correct Loan Fees to the last tab.
      iv. **Set Up SACR > Product Related > Financial Aid > Awards > Fiscal Item Types**: Update/confirm Max to Offer, Max to Accept and Disbursement Amounts for each item type.
      vi. **Set Up SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules**: Review for changes.
      vii. **Set Up SACR > Product Related > Financial Aid > Budgets > Budget Items** (verify Pell Amounts particularly).
      viii. **Set Up SACR > Product Related > Financial Aid > Loans > Create Loan Types**: Any DL loan Types need to be reviewed for changes to loan fees. If necessary, ensure fees are updated in the “Loan Fee Rate” box.
      ix. **Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan**: If you are using different loan item types for even and odd years, update the Item Types on the last two tabs.

6. If you previously disallowed self-service access, allow access when packaging begins: **Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options**.
7. **Set Up SACR > Product Related > Financial Aid > Budgets > Budget Groups**: If you use the Budget Group Zero, ensure it copied over to the new aid year.
8. **Financial Aid > Awards > Self Service Awarding > Assign Self Service Access**: Consider running this to deny Award Access and EA Access for prior aid years.

   a. Record (Table) Name: use STDNT_AID_ATRBT, Selection Tool: use PS Query, Institution: Your institution code (like BSC01, LRSC1, NDSCS). Aid Year: The aid year you want the update to run for. Query Name: NDU_FA_SHOP_SHEET_GROUP, Edit Prompts: Enter institution, term and the Career that matches the Shopping Sheet Group you are assigning. Field Name: Shopping Sheet Group Field Value: Shopping Sheet Group that belongs to the population in the PS Query you are using.


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