CUSAD MINUTES  
Thursday, February 20, 2014  
Conference Call

PRESENT

BSC       Jeff Jacobs  
DCB       Valerie Heilman  
DSU       Sandy Klein and Kathy Lowe  
LRSC      Katie Nettell  
MaSU      Shirley Hanson  
MiSU      Laurie Weber  
NDSCS     Shelley Blome, Melissa Jaskowski, Kassi Griffin and Sheila Dolan  
NDSU      Jeanne Enebo and Sandy Prudhomme  
UND       Janelle Kilgore and Rohit Kulkarni  
VCSU      Betty Schumacher and Marcia Pritchert  
WSC       Cassy Waste  
Campus Solutions Dennis Junk, Sue Applegren and Tom McNaughton  
NDUS      Brenda Zastoupil, Kristin Ellingson and Marge Michael

Janelle Kilgore called the meeting to order at 1:32 pm.

January 20, 2014 CUSAD MINUTES
The new passive approval of minutes procedure has begun wherein the January 20, 2014, minutes were emailed to the CUSAD group. Any corrections or additions are to be sent to Janelle Kilgore.

ADDITIONS TO AGENDA

Input regarding ImageNow – Sandy Klein

NEW BUSINESS

1. User Acceptance Testing – Tom McNaughton
   Tom McNaughton, Director of Campus Solutions, attended the CUSAD meeting to request input and feedback from the CUSAD group on implementation of the testing process. He said that there are many kinds of user testing processes but he doesn’t want the process to be cumbersome but it must remain effective and timely. Two issues that have caused problems but that could be easily addressed are:
   - Testers need to respond when their testing is complete whether or not problems were found, and
   - A defined deadline for completion of testing needs to be provided to testers.
   The desired process would be something like:
   1. Request development.  
   2. Programmers complete task. 
   3. Place in staged environment for input and user testing. 
   4. Correct any issues that arise. 
   5. Place in production environment. 
   Currently, IT is trying to fix problems that arise after process is in production rather than prior to production. By including testers in preliminary setting, costs are reduced, users take ownership of process, impacted departments work together better, etc. Tom envisions the ‘User Acceptance Testing Process’ to work similarly to the ‘Campus Community Group’.

   Campus Solutions would schedule testing to avoid the busiest times for institutions. If any CUSAD members are interested in participating in the ‘Acceptance Testing User Group’, let Tom know.
Katie noted that she feels that this is the right way to go and is interested in knowing more about the ‘life cycle’ of a Development Request (DR). Tom offered to create a document for this purpose.

Janelle asked if all departments can see the DRs that others are doing. This would help to give a better idea of origination of details. Jeff agreed in that it would be good to have detail early on -- before programming. Perhaps different institutions could dedicate certain people to do all the testing for other schools. Specific times could be carved out and financial aid people could do process testing.

Tom reemphasized that he wants to receive a positive or a negative response as opposed to simply not answering.

Katie said that DRs will often affect different divisions/departments. How do we coordinate with other divisions and cross train? Tom said that there are some DRs that do include more than one area and agrees that this does have to be considered.

Laurie would like the outcome to be more visible as financial aid people don’t always know what they are testing, so consequently don’t test.

Tom stated that Dennis and Sue are very good about sending out requests and getting suggestions. They may need to add a deadline and a ‘please respond either positively or negatively—don’t just ignore’ statement. The goal is to have testing done on the front end with due diligence in place, creating better understanding on all levels.

Janelle, after conversation with Madhavi Marashinghe, Associate Director of Enterprise Services, requested the ability to query in stage environment instead of production only. Per Dennis, refreshing the environment needs to be done in a more timely manner.

There is documentation on the CTS (SITS) website for all to see. https://sits.ndus.edu/sits-departments/connectnd/campus-solutions/training-documentation/

Tom said that one problem is making documentation specific enough and yet understandable to all users.

Jeanne reiterated that refreshing of stage environment is imperative.

Tom restated that anyone from the group is welcome to provide input via email to him as well and that he will provide a ‘Development Request Life Cycle’ document to the group.

The group unanimously approved the plan to create the ‘User Acceptance Testing’ process as discussed.

Rohit added that more tools for testing are needed (e.g., ‘if, then’ statements). It would help to see tables and fields related to the specific DR also. With regard to Rohit’s request, Tom responded that a balance has to be struck to make more information available but not too much. For one thing, programming skills of financial aid administrators differ. Laurie asked why we wouldn’t take advantage of a particular skill or advocate if CUSAD has an advocate such as Rohit who could help all schools.
2. **IPEDS – Janelle Kilgore and Rohit Kulkarni**
   Janelle pointed out that if an IPEDS report was pulled today (i.e., 02.20.14), the results may be significantly different than what was submitted the prior week. [Sue and Dennis have already corrected a couple of glitches.] For instance, with respect to Group 4 of IPEDS, Rohit helped Laurie and found that tuition waivers were not being included. Was information that had been submitted previously erroneous and, if so, now what? Should all schools go into IPEDS and ask that it be unlocked? Lisa Johnson, NDUS, has final lock on IPEDS data and the date is February 26. Sue offered to rerun any school’s data if the school sends her its run control parameters in both csv and pdf formats.

   Jeff asked if there was an update from Dennis and/or Sue for the C Code processing. The process should be to production next week. It is now in stage.

4. **Review of Loan Academic Year End Adjustment – Jeff Jacobs**
   Before sending summer loans to COD, set up will change anyone for summer loans from August to August. If the loan gets cancelled, the process will have to change back to May.

5. **Input Regarding ImageNow – Sandy Klein**
   DSU is considering implementation of ImageNow and Sandy wanted input from the group. Janelle said that UND has been using it for about eight years and they like it. It greatly enhances office flow. They are currently trying to get students to submit forms directly into ImageNow. Minot State also uses it but Laurie feels that they could do a better job of utilizing more facets rather than just using it as a filing system. Jeff suggested that Sandy go somewhere to actually observe the processing. Janelle and Jeff both suggested that DSU first complete a work flow diagram/process mapping on paper. Also, there should be many enhancements coming with the NDUS ImageNow purchase.

**OLD BUSINESS**

1. **Last date of attendance for unofficial withdrawals – Jeff Jacobs**
   Jeff went back into NSLDS and did as Jeanne described at last CUSAD meeting. There is no step-by-step process though. Use the ‘Enrollment Update’ tab. The trigger for this discussion is that inaccuracies have been named as one of the major audit findings.

2. **Other**
   How to set up packaging for first run of freshmen only (not to include transfers) – Sandy Klein
   Check box to ‘include or exclude transfer’.

   **Shopping Sheet Email Dated 02/18/2014**
   Confirmed that this is the set up for 2015 (but it is not in Bundle 32).

   **NDUS Financial Aid State Grant Update – Brenda Zastoupil**
   The NDUS Financial Aid Office is getting the State Grant Advisory Board meeting scheduled for March. The award amount will not change for the 2014-2015 award year. Brenda visited with the Chancellor on 02/19/2014 with regard to the current calculation for ND State Grant (SSIG) eligibility: COA – EFC – Pell = Unmet Need CUSAD group will be updated as needed. The initial lists of students will be out in March or April for 2014-2015.

   **Packaging issue – Janelle**
   Janelle’s staff has identified that unmet need is not calculating properly. It is pulling in unsubsidized loan. There is a financial aid item type on 2nd tab that determines how the process works. Check or uncheck ‘Meet Need’ box, as required.

**MEETING ADJOURNED**

The next meeting is tentatively set for March 20, 2014. The meeting was adjourned at 3:23 pm.

Minutes prepared by Marge Michael, NDUS