Council of University Student Aid Directors (CUSAD)
MINUTES
Thursday, July 17, 2014
Conference Call

PRESENT
BSC     Scott Lingen, Linda Greenstein
DCB     JaLee Lynnes
DSU     Sandy Klein, Kathy Lowe, Chris Meek
LRSC    Katie Nettell
MaSU    Shirley Hanson
MiSU    Laurie Weber
NDSCS   Shelley Blome, Sheila Dolan, Carmen Marohl, Melissa Jaskowski, Kassi Griffin
NDSU    Jeff Jacobs, Bonnie Litton, Sandy Prudhomme
UND     Janelle Kilgore, Rohit Kulkarni, Kellie Choate, Desi Runck
VCSU    Betty Schumacher, Marcia Pritchert
WSC     Anna Vinger
Campus Solutions    Dennis Junk, Sue Applegren
NDUS    Marge Michael

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

ADDITIONS TO AGENDA
ISIR Comment Code 257 – Sue Applegren
[Comment Code 257: Indicates that NSLDS has determined that the student may have received a total amount of student loans that is close to or equal to the federal loan limits – No resolution required] Campus Solutions had a request from a school to change current setting from ‘action required’ to global setting of ‘ignore’. The setting has gone back and forth over the years. The group was in favor of setting the code to ‘ignore’. Sue indicated that it will be changed before the meeting is over.

NEW BUSINESS
1. Unofficial withdrawal report – Shelley Blome
Shelley Blome/Sheila Dolan asked if the number of credits for each individual class could be added to the unofficial withdrawal report because NDSCS uses pdf format. Janelle recommended that the field be added to both excel and pdf formatted reports. No one opposed the request and the priority was set at high, preferably to be used at the end of the summer. Dennis does not know the difficulty of this update so is unable to assure a completion date at this time.
2. **High School Students in College Coursework Guidelines – Brenda Zastoupil**
   In Brenda's absence, Dennis asked the group if anyone had any concerns about the *High School Students Enrolled in College Coursework* document [attached to these minutes] which appears to have originated from 'Pathways' considerations. After a short discussion, the group concurred that it would like a sentence added to the document stating that 'dual credits are not eligible for federal financial aid'. Basically, dual credit students are non-degree seeking and, therefore, not eligible for federal financial aid. Both admissions and records offices should be made aware of this distinction and code these students appropriately and consistently. Sandy K. questioned the eligibility of high school students who graduate a semester early. These students would not be eligible in the fall but would be potentially for the spring only. Katie will follow up with Brenda.

3. **Development Request - NDUS ISIR Comments provides fields for 8 comment codes – Katie Nettell**
   LRSC has been running the NDUS ISIR Comments query for comment codes 361-368. When it is run, it only allows for 6 codes. They would like to see the query expanded to include 8 fields. Dennis said it is a small change and easy to do. Alternatively, Campus Solutions could give some kind of hard code. Some run the query to find students who are nearing their maximum aid. The group supports 7-10 available fields. Dennis said that it will be done very soon. Katie will study the best way to set up the query. UND and LRSC will confer with Dennis and come back to group with recommendation.

4. **SULA setup – Sue Applegren**
   Sue asked the statuses of schools' SULA setup now that the critical patch is in production. SULA setup has to be completed by all schools prior to CS running the global update. SULA has to be set up on both the records and the financial aid sides. Sue can resend the email that tells what schools have to do now vs what can wait. The initial email was sent out last Saturday (July 12) by Dennis. Is CS going to let schools know if all is working, e.g., national clearinghouse? Before schools can send an outbound loan, there is a query that will tell which students do not have SULA information. FA just has to retrieve information from the records offices. A special process was done for med students and is currently being processed 'outbound'. Jeff asked: how do we know (1) that the records office is set up and (2) that it has been set up correctly? Dennis said the FA directors need to talk to their records offices. If FA sees lots of errors, records may not be done or may not be done correctly. Laurie asked what happens if there are blanks? Dennis explained that the blanks MAY be legitimate. If there is no information, the student won't have a loan anyway. Dennis' recommendation is to leave the blank student records and delete them later unless there is a problem.

   Student records are rebuilding in projection so this is not a problem. These errors only need to be corrected if the student is going to have an originated loan.

   Janelle asked when schools anticipated their set ups would be done.
   LRSC – Monday; MiSU – waiting for info; NDSCS and WSC – waiting for Registrars to set up

   The bottom line per Sue is that once SULA set up is done at respective schools, let Dennis and Sue know.
5. Social Security Number Masking – Katie Nettell
   The Campus Community group is moving along with Social Security Number
   masking, particularly for 1098-T. The CC group has asked for approval to go in and
   update/change SSN. However, AACRAO [American Association of Collegiate
   Registrars and Admissions Officers] suggested that a popup be used for/by
   the student to confirm the SSN. If the SSN is incorrect, FA would be notified. No one in
   the CUSAD group had any issues with this change. CC is still just discussing it, so it
   is not necessary for CUSAD to vote today.

6. Query/report used to identify bachelor’s degree – Janelle
   Janelle asked if anyone is using anything other than query in PeopleSoft to identify
   students who have already earned their bachelor’s degrees. UND would like to
   identify students with bachelor’s degrees who have a loan. Laurie has a modified
   query that she uses. It is modified based upon FAFSA/admission application data.
   Since the modified query initially came from Jeff, Janelle will contact him for further
   information.

7. CUSAD lead – Janelle Kilgore
   Janelle pointed out the rotation schedule and that the group had begun diverging
   from the schedule. How does the group wish to go forward? Janelle offered to lead
   for another year. It was agreed that it helps the schools to have buy-in if they each
   take turns throughout the years. Janelle suggested that the starting date of the term
   be August 1 going forward. The new rotation will start with the 2009-2010 year.
   Janelle and Marge will work on the rotation schedule. There was no disagreement
   from the group. Shelley Blome volunteered to chair August 1, 2014 – July 31, 2015.

OLD BUSINESS
   Updated Action Items will be sent to members for review within the next few days.

   Preparing for NSLDS reporting related to 150% loan limits—Jeff.
   [Item should have been deleted from last month’s agenda.]

OTHER
   Self-Service Issues – Jeff Jacobs
   NDSU sent two help tickets in today. Although both are related to self-service, they were
different issues.
   (1) Students trying to report external aid: sporadic problems wherein students not being
       able to use function. Betty had reported a problem with this at last month’s meeting.
       Sue had not yet seen the help ticket on this problem. Jeff will follow up to make sure
       Sue gets the help ticket.

   (2) Students trying to accept aid: sporadic problems with getting an error message that
       aid is rejected. Sue had been working on this and was getting a message indicating that
       there was a mismatch between FA term and award. This problem is not apparent to Sue
       nor does she know how to correct it. She has sent a request to PeopleSoft for
       assistance.
Packaging if Verification is not Complete - Sandy Klein
Sandy Klein asked how many schools package if verification process is not yet complete. BSC, DCB, and NDSCS require that verification be complete prior to awarding. UND packages but doesn’t let students accept loans until verification is complete.

Address for National Student Clearinghouse – Sandy Klein
DSU is up for recertification. Sandy K. asked for the NSC address. Shirley said that you just have to click on a drop down menu now and that information is prefilled.

MEETING ADJOURNED
The next meeting is tentatively set for August 21, 2014. Janelle adjourned the meeting at 2:33 pm.

Minutes prepared by Marge Michael, NDUS
CUSAD CHAIR ROTATION SCHEDULE  
Council of University Student Aid Directors

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Institution (Rotation)</th>
<th>Institution (Actual)</th>
<th>Chair</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999-2000</td>
<td>UND</td>
<td>UND</td>
<td>Alice Hoffert</td>
</tr>
<tr>
<td>2000-2001</td>
<td>DSU</td>
<td>DSU</td>
<td>Sandy Klein</td>
</tr>
<tr>
<td>2001-2002</td>
<td>MiSU</td>
<td>MiSU</td>
<td>Dale Gehring</td>
</tr>
<tr>
<td>2002-2003</td>
<td>WSC</td>
<td>WSC</td>
<td>Lynn Aaberg</td>
</tr>
<tr>
<td>2003-2004</td>
<td>NDSU</td>
<td>NDSU</td>
<td>James Kennedy</td>
</tr>
<tr>
<td>2004-2005</td>
<td>VCSU</td>
<td>VCSU</td>
<td>Betty Schumacher</td>
</tr>
<tr>
<td>2005-2006</td>
<td>BSC</td>
<td>BSC</td>
<td>Jeff Jacobs</td>
</tr>
<tr>
<td>2006-2007</td>
<td>NDSCS</td>
<td>NDSCS</td>
<td>Shelley Blome</td>
</tr>
<tr>
<td>2007-2008</td>
<td>LRSC</td>
<td>LRSC</td>
<td>Katie Nettell</td>
</tr>
<tr>
<td>2008-2009</td>
<td>UND</td>
<td>UND</td>
<td>Dennis Junk</td>
</tr>
<tr>
<td>2009-2010</td>
<td>MiSU</td>
<td>MaSU</td>
<td>Shirley Hanson</td>
</tr>
<tr>
<td>2010-2011</td>
<td>DSU</td>
<td>MiSU</td>
<td>Dale Gehring</td>
</tr>
<tr>
<td>2011-2012 (Aug Only)</td>
<td>MiSU</td>
<td>WSC</td>
<td>Lynn Haverlock</td>
</tr>
<tr>
<td>2011-2012 (Sept - July)</td>
<td>MiSU</td>
<td>NDSU</td>
<td>Jeanne Enebo</td>
</tr>
<tr>
<td>2012-2013</td>
<td>WSC</td>
<td>VSCU</td>
<td>Betty Schumacher</td>
</tr>
<tr>
<td>2013-2014</td>
<td>NDSU</td>
<td>UND</td>
<td>Janelle Kilgore</td>
</tr>
</tbody>
</table>
High School Students Enrolled in College Coursework
North Dakota University System, 3-5-14

METHODOLOGY
These guidelines are based on the pretext that the NDUS only awards college credit, it does not offer high school credit. The high school determines, on an individual basis, whether or not the high school student concurrently earns high school credit for the college or university course. In all cases, the student earns college or university credit for successful college course completion, regardless of whether or not the student is simultaneously receiving high school credit. Thus, the guidelines below attempt to eliminate the historic distinction between dual credit and early entry students, and consider a common structure for all high school students enrolled in college or university coursework.

GUIDELINES

1. Tuition and Fee rates-
   - Full implementation of common high school student rates by not later than Fall 2015; campuses may begin full or phased implementation beginning in Fall 2014
   - Agreed upon common High School Student Tuition Rates:
     - Subsidized rate of $65 per credit hour for Fall 2014 plus the CND and NDSA per credit hour fees; will need to be reviewed annually and adjusted, as needed
     - Unsubsidized rate of $115 per credit hour for Fall 2014 plus the CND and NDSA per credit hour fees; will need to be reviewed annually and adjusted, as needed
   - Neither waiver of tuition or fees is permissible for students receiving the subsidized and unsubsidized rates.
   - Early Entry students taking regular degree credit courses at the same physical location with other college students will be billed at the Regular SBHE Approved Tuition Rate for the institution.

2. Billing codes – Common location codes (“HS-Subsidized” and “HS-Unsubsidized”) will be set up and configured to courses and/or class sections. This will provide a simple identification for billing the appropriate courses/class sections for the high school (HS) students at the subsidized and unsubsidized rates. A special location code will not be necessary for the high school students who are in the same course/class section as other college students, as they are charged the Regular SBHE Approved Tuition Rate. The process will include the following, and all must be completed by July 1, 2014:
   - Core Technology Services (CTS) Student Records/Finance will set up the two location codes.
   - CTS Student Records/Finance will provide details to the appropriate staff on the campuses, of the tasks that will be necessary for the process to work properly.
   - Campus Student Records staff will configure location codes to the appropriate classes.
   - Campus Student Finance staff will create the term fees for the two location codes for Fall 2014.

3. Admit codes – The recommendation is to move from the two existing admit codes for high school students (dual credit and early entry) with one admit code for "qualified high school admits." The NDUS offers college credit, and it is up to the high school, not the NDUS, whether the student simultaneously receives high school credit or not. The NDUS is not
always aware that the student is receiving dual credit, and as a result, the distinction between dual credit and early entry students may not be accurate for all campuses.

4. **Enrollment reporting** – All qualified high school students that have been admitted will be combined in the official enrollment reports and reported under the heading “high school students enrolled in college coursework.” Dual credit and early entry students will not be reported separately.

5. **Academic Standards** – Standards have been developed jointly by DPI and the NDUS for high school students enrolled in college coursework. All courses must maintain the academic rigor and achieve the expected outcomes of the college classes. Colleges/universities and high schools are expected to abide by the following standards.

NDUS Institutions offering college or university credit courses to high school students shall meet the following standards:

- Instructors teaching credit-bearing college-level courses must meet the same academic credential requirements as faculty teaching on campus.
- Students must meet the same academic criteria as those enrolled in credit-bearing college courses, including taking appropriate placement testing.
- College credit courses will be offered within the term of one semester.
- Learning outcomes for college/university courses offered in the high school will be assessed and are expected to match those for the course taught on campus.
- Institutions shall provide high school instructors with an orientation in course curriculum, assessment methods, and administrative requirements before high school instructors are permitted to teach dual credit courses.
- Instructors must be given the opportunity to participate in all activities available to other adjunct faculty, including professional development, seminars, site visits, and internal communication, provided that such opportunities do not interfere with an instructor’s regular teaching duties.
- Courses shall be reviewed annually by appropriate campus personnel to ensure consistency with campus courses.
- Courses taught at the high school must use a college approved syllabus textbooks and materials.
- A college/university course must be at least 2 semester hours to be eligible for the award of high school credit unless the course is an affiliated science lab.

**Definitions:**

- **Dual Credit Student**: A high school student who enrolls in college classes and also earns high school credit, as determined by the high school. The college classes will count toward both high school graduation and for future undergraduate degree. The NDUS is eliminating this terminology due to the inability to know if the high school student is receiving high school credit for the college course.
- **Early Entry Student**: A high school student enrolled in college classes. The college class may or may not count toward high school graduation, as determined by the high school.
- **High School Student**: A student who has not yet graduated from high school, but is enrolled in a college class. It is intended to include both historical categories of dual credit and early entry.
- **High School Student Subsidized Tuition Rate (HS Sub Rate)**: Rate assessed to a high school student taking a college credit class wherein the school district is subsidizing most of
the cost of instruction. Delivery may be face-to-face in the high school classroom or over Interactive Video and is taught by a high school instructor (or other qualified staff) as an approved adjunct of the college or university. The cost of the high school instructor (or other qualified staff) is subsidized by the school district. There may or may not be a small stipend paid by the college or university to the adjunct, but the bulk of the adjunct’s pay is coming from the school district.

- **High School Student Unsubsidized Tuition Rate (HS Unsub rate):** Rate assessed to a high school student taking a college credit class wherein the college or university is subsidizing the cost of instruction. Delivery may be face-to-face in the high school or via Interactive Video by a high school instructor (or other qualified staff) as an approved adjunct of the college or university or may be taught on campus or via IVN by the institution’s fulltime or adjunct faculty for high school students only. In both cases, the institution pays the instructor. The NDUS faculty member may be simultaneously instructing NDUS students on campus and delivering the course via IVN to high school students. Only the high school students would qualify for the HS Unsub rate, based on a different location code.

- **Regular SBHE-Approved Tuition Rate:** This rate is for high school students that are taking regular degree credit courses on campus, online or over IVN with other college students, based on residency and/or instruction. The high school student may or may not also be simultaneously receiving high school credit for these courses. That is a local high school decision. In addition to the regular campus tuition rate students will also pay mandatory NDUS and campus fees.

- **Billing Location Codes:**
  - “HS-Subsidized” - Classes taught at the high school or via IVN by high school instructor or other qualified staff as an adjunct of the college, and **paid by the school district.**
  - “HS-Unsubsidized” - Classes taught at the high school, college/university campus or via IVN by the campus’s full-time or adjunct faculty to **high school students only**, and **paid by the campus.**