Council of University Student Aid Directors (CUSAD)
MINUTES
Thursday, December 18, 2014
Conference Call

PRESENT
BSC Scott Lingen, Linda Greenstein
DCB Val Heilman
DSU Sandy Klein, Kathy Lowe, Dr. Suzanne Russ
LRSC Katie Nettell
MaSU Shirley Hanson
MiSU Laurie Weber
NDSCS Shelley Blome, Sheila Dolan, Melissa Jaskowski
NDSU Jeff Jacobs, Bonnie Litton, Sandy Prudhomme
UND Janelle Kilgore, Rohit Kulkarni, Bruce Helgerud
VCSU Betty Schumacher
WSC
Campus Solutions Dennis Junk, Sue Applegren
NDUS Brenda Zastoupil, Kristin Ellingson, Marge Michael, Lisa Johnson

Chair Shelley Blome called the meeting to order at 1:35 pm.

ADDITIONS TO AGENDA
NDU Query - Request ‘repeated course addition date’ – Jeff Jacobs
Jeff Jacobs and NDSU staff requests that a column be added to the repeated course query that shows the date the student added the course. With this addition and if the date is after census, the FA office wouldn’t have to look at that course. Sue Applegren indicated that this should be a matter of just adding a column because the query already displays classes and terms. The date that the course was added should be in the same table as the previous items so it shouldn’t be too hard. Chair Shelley asked if there was anyone against adding the column. Upon hearing no response, the request was to be put forward. Regarding priority, Jeff asked if it could be done before spring classes begin. Although there is a freeze on new programming as of Jan 5, Sue and Dennis thought this timeline was reasonable.

NEW BUSINESS
1. CCF Item – Campus Autonomy Proposal – Dr. Suzanne Russ DSU
Dr. Suzanne Russ, DSU, representing the Council of College Faculties (CCF), joins the call to summarize the proposal that has been discussed with the NDUS Academic Affairs Council (AAC). The Council of College Faculties is seeking to open a conversation to suggest autonomy for campuses’ in scheduling their own academic calendars, specifically to allow an intersession (4-1-4) or also called J-term. The rationale for this request is that
there have been many demographic changes across the state in recent years which may create different needs geographically. The Council is looking for a conversation about setting schedules through autonomy. The proposed intersession would allow for expanded international experiences; immersion into research environment; and enhanced internship opportunities. Intersession classes could also be offered on campus. Benefits may include: additional opportunity to get degrees more quickly and to utilize faculty potential. Students are not charged additional tuition for interim/intersession unless there are overload credits to consider. Discussion: How does one institution relate to others that are on different schedules? How would we handle SAP? Grades are posted very quickly for interim courses. On 4 term schedule, would spring break go away? Per Dr. Russ, Higher Learning Commission requires 750 min = 1 credit. Thus, the 4-1-4 plan fits into same schedule NDUS already has. When would intersession student be registered on census? It could be part of the fall semester or part of the spring semester, either way. The CCF feels this would be good option for our state. On Jan. 6, AAC has its next meeting. Dr. Russ has additional information she can forward to our group. Laurie asked Dr. Russ to clarify pushing back spring semester. Academic years usually start late August and continue until late May to get all required hours in. This type of schedule may have implications for housing as well. Is there any concern about how this would impact transfer students? Dr. Russ didn’t think handling transfer students would be too much of a problem. How would this affect IVAN campuses? Dr. Russ confirmed that this is not a formal proposal. They are just trying to approach conversation. Would overlapping terms be a problem? MN has autonomy but dictates start date. Dr. Russ reaffirmed that this type of academic year has been done in other areas and we can get assistance from people who are experienced. Dr. Russ was not able to contact controllers so did not have any information directly from that group. Chair Shelley thanked Dr. Russ for providing information and joining our meeting today.

2. Housing & Books for new VA info needed for IPEDS – Kathy/Sandy DSU
Resolved by Dennis prior to meeting. [See attachment to minutes.]

3. UND query to identify students without FAFSAs – share? Kathy/Sandy DSU
Sandy Klein asked if UND would be willing to share the query to identify students without current FAFSAs that Rohit had developed. Rohit is willing to share the query and will forward it to Shelley who will make it available to all NDUS directors. Jeff asked for what purpose UND uses the particular query. Financial aid and other departments use the query primarily for retention and communication purposes. Janelle said that it also helps to create a more targeted audience when contacting students for the fall semester. No one opposed sharing of the query and marked it as ‘super high priority’ to be completed by April.

4. Advisors access to advisee award notice letter – Katie
Katie asked to revisit the concern that advisors have access to advisee award letters with regard to FERPA compliance/issues. She referred to the email from Tom McNaughton dated December 18, 2104, to the NDFAD listserv wherein Tom explained that he and Dennis had spoken with LeRoy Rooker [Head of the Department of Education’s Family Policy Compliance Office] on December 3rd. Tom said that ‘after explaining the question brought up by the CUSAD group, Mr. Rooker was not concerned and expressed that he sees no issue with our current practice allowing the Academic Advisor the ability to view the student financial aid data.’ Katie had researched further in NASFAA Best Practices regarding the ethics of sharing and felt that problems could arise. Janelle feels that we are talking about sensitivity and may need to have more education available. Brenda
noted that she had just received some language from NDUS legal staff with regard to FERPA redisclosure that may be helpful. Katie is concerned that if a school uses paper form (which many do at least for first year students) award letters, whatever is on FA letter can be viewed by the advisor. If a school uses electronic only, not all information is available. If no one has concerns, we can go forward with putting something together for educating advisors. Per Shelley, Barb at NDSCS has prepared a FERPA session and requires new users to go through training. Katie will put together a synopsis of FERPA issues and associated training and present to CUSAD.

5. **AY Rollover – Sue**
   On December 10, Sue had sent an email regarding the AY Rollover to NDUS financial aid directors. It contained things that need to be completed by the financial aid officers before processing can be done by Campus Solutions. Sue asked for a date that directors feel that this can be accomplished. Jeff asked when Campus Solutions has to have it done. Sue said that the first week in January was the deadline. When do schools want to start importing 2015 ISIRs? Typically, first few days of January are desirable because this prevents ISIRs from sitting in stage and getting lost. Betty would like to start importing mid-January. Wednesday, December 31, was suggested as completion date for campus portion and Friday, January 2, would then be Campus Solutions portion. Collaborative grades may not be in until the Monday after Christmas. Campus Solutions will be running SAP on December 29th or 30th. Sue was asked to clarify some things on the email that she had sent regarding the campus portion. Don’t roll over item types that aren’t needed any longer. Also, term categories and academic dates, etc. HAVE to be done and done correctly. Campus Solutions then does its part. After that, campuses are notified about the additional items that need to be done. For example, Pell tables don’t come until later. NDSU campuses agree to have their portions completed by Dec. 31 so that Campus Solutions can complete its portion by Jan. 2. All other NDUS schools agree. Note: Sue’s email included registrars’ set ups also.

6. **Pell Repackaging Issue – Sue – see addendum**
   Rohit said that students have been incorrectly packaged for the past two years. Return to Title IV students are impacted. The process seems to be working better now due to understanding what it was doing. Dennis and Sue worked with UND and Rohit is now comfortable to run this process in production. Sue said that not all schools are using the Pell only repackaging because they are faced with the problem(s) that UND had. Oracle said to create a query to find missed students. This impacted five schools and less than 60 students. Sue is asking the group to approve a development request for a query to identify students prior to repackaging (suggested by Oracle). It would be a review of the fields listed on the attachment. Sandy K. wanted to know which schools had students that were impacted: BSC, NDSU, NDSCS and UND. Rohit approved the request; Laurie seconded; no one opposed. Linda G. asked when the report was run to find the schools impacted. Sue said 4-5 weeks ago. Sue asked Rohit to review the fields since he has worked with the issues. Rohit will contact Sue after meeting.

7. **Perkins cancellations – Laurie**
   Laurie W. wanted to discuss a request from Minot State University Business Office. They were trying to compare Perkins Loan cancellations [i.e., fewer cancellations in 2013 than prior year]. It seems the change had to do with ECSI. Prior to SLSC hiring ECSI as servicer, students were made more aware of the procedure for requesting cancellations as processing was done with SLSC. There was discussion about students’ negativity with new servicer, ECSI. This third party servicer is not providing students with same quality...
of service as SLSC did. Per Shelley, Kelly is open to CUSAD’s suggestions and is aware that changes need to be made. Get feedback to Kelly individually.

8. **Query for expanded TRIO information – Shirley**
   A Vice President at Mayville State University has requested application for a Title III Waiver. Pell Grants don’t quite make MaSU eligible. Can TRIO query be expanded to include data and be utilized for this purpose? Katie said that LRSC also was not eligible for waiver last year but a consultant said changes had some unintended consequences. Campus Solutions will review the query to determine possible use for this purpose.

9. **Common Data Set testing – Brenda**
   Brenda reported that North Dakota is still not listed on Project on Student Debt (POSD) which is drawn from Petersons. She has had discussions with Petersons and POSD. Schools can fill out portions of the Petersons report and don’t have to complete the whole thing. UND has done a little bit of testing but it takes a very long time to test. UND is not done testing and needs more time. Laurie has had limited time to do testing. It is definitely difficult and labor intensive, partially because you have to start on the first question and reaffirm each question. Per POSD, some of the schools are reporting. Are the reporting schools using CDS or creating their own report using raw data? LRSC uses CDS. Brenda just wanted to know how schools are progressing with use of the CDS.

**OLD BUSINESS**

**MEETING ADJOURNED**

The next meeting is tentatively set for January 15, 2015. Shelley adjourned the meeting at 2:49 pm.

Minutes prepared by Marge Michael and Kristin Ellingson, NDUS
CCF ITEM: Campus Autonomy in Scheduling
Dr. Suzanne Russ

Overview: The Council of College Faculties seeks the opening of formal discussion of NDUS campus scheduling policy at the Academic Affairs Council. This proposal builds the specific case for campuses’ autonomy in scheduling their own academic calendars, but a general discussion of the calendar is what is sought.

Rationale:
1. Demographic changes across the state of ND in recent years have created notably different climates for the universities located in various locations. In the western part of the state, the demographic changes associated with the oil industry have generated a notable shift in current and potential student population.
2. Campuses may be best able to serve the changing needs of their communities and regions through a calendar designed to the needs of its region rather a calendar developed to treat the entire state as a single entity.
3. Alternative calendars would be required to meet the necessary contact hours for credit as established by SBHE; this would not change.

Background:
1. According to the publicly available records, it appears SBHE’s current scheduling policy has been in place since 1983. It may thus be timely to review the policy.
2. Publicly available state board policy in our neighboring states of Minnesota and Montana suggest that both states allow campus scheduling autonomy in all matters except a start date. South Dakota appears to utilize a single calendar for the entire state. I have not yet sought information from other states.

Description:
1. The calendar idea most supported by the NDUS faculty contacted is 4-1-4 scheduling, in which a 3-week January session (J-term) would inserted between fall and spring semester. Ideas for the J-term brought forward by faculty throughout the system have included:
   a. Deep Field Experience in Education: The new accreditation guidelines for Teacher Education programs (InTasc Standards required by the Council for the Accreditation of Educator Preparation) include specific mandates regarding teachers’ field experience with a range of diverse students. A J-term would allow the development of such experiences in a range of settings.
   b. Expanded International Opportunities: A J-term would allow students with tightly scheduled academic coursework to have a monthlong international experience not otherwise possible.
   c. Enhanced Internship Opportunities: A J-term would allow in-depth internship opportunities in industry, in the field conducting research, or on other academic investigations within and outside the U.S.

Benefits:
1. Increased likelihood of 4-year graduation: Students could gain an extra 3 credits during a J-term and therein increase the likelihood of graduating within four years, particularly if they have sought additional educational opportunities or internships that would otherwise extend their time in college.
2. Greater opportunity to maximize faculty potential: By allowing alternate schedules that include a J-term, faculty could share the full richness of their academic training with students in an in-depth firsthand experience.
Attachment for Agenda Item #2
Housing & Books for new VA info needed for IPEDS – Kathy/Sandy DSU

IFEDS Survey Material View Next Year Changes

Section 2: Veteran’s Benefits

Student Financial Aid for public institutions reporting on a fall cohort (academic year report)

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<th>Total dollar amount of benefit/aid awarded through the institution</th>
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Veteran’s Benefits

This section is applicable to undergraduate and graduate students.

For both undergraduates and graduates, provide the total number of students receiving Post-9/11 GI Bill Benefits and the total number of students receiving Department of Defense Tuition Assistance. If a student receives both, they should be counted in both.

For both undergraduates and graduates, provide the total dollar amount of Post-9/11 GI Bill Benefits and Department of Defense Tuition Assistance awarded through the institution. Do not report any benefits that do not get awarded through the institution.


More information about Department of Defense Tuition Assistance can be found at http://www.dod.mil/.

http://surveys.nced.ed.gov/ipeds/ViewNextYearForms.aspx?year=2&survey=7&form=16... 1/10/2014
**Attachment for Agenda Item #6**  
**Pell Only Repackaging Issue-Background info for CUSAD discussion**

UND used this process to repackaged Pell awards for fall 2014. They identified a student who was enrolled for 1 credit but was not selected by the Pell Only Repackaging process. Student was enrolled in 1 credit course with a Start Date of 10/13/2014.

A case was submitted to Oracle for review.

Oracle response was:

The Pell calculation routine uses the FA Term start date to determine which calculation to use, as documented Packaging and Repackaging: Common How To Questions (Doc ID 1110215.1). "Pell Calculation Start and Midterm - What Date is Used?" Student’s Start Date was 10/13/2015 so that’s why the system was continuing to validate the student as full time - since that’s what you have defined as the 'Pell calculation START' setting.*

The system will still use the Pell calculation start setting until that date has passed, (10/13/2014 in this case) and then begin using the Pell calculation census setting (09/05/2014). I have updated the previously referenced Knowledge Article to clarify this situation.

The issue will be resolved with the following steps:
1. Once census has passed and before you begin Pell repackaging based on load, write a query to find all students whose fa term start date is >= term census date.
2. For these students, navigate to View Packaging Status Summary and override the Pell START and MIDTERM settings to 'formula 1 fa load', and save the component.
3. Run Pell repackaging.

*SACR> Fin Aid> Aid Year> Aid Processing Rules Setup, Aid Process Rule Set is set to Pell Calculation Start: Formula 1-Full-Time

Based on Oracle’s advice, we suggest a query be created to identify these students to allow you to make the recommended changes prior to running Pell Only Repackaging.

These are some suggested fields:

- EmplID,
- Name,
- Institution,
- Aid Year,
- term start date if later than FA Census,
- lock status if Y,
- Pell award item type and career,
- SAP status,
- R2T4 Worksheet status,
- fall accepted Pell amounts
- spring accepted Pell amounts
- fall FA Load
- spring FA Load