Present:
   Jeff Jacobs, BSC
   Valerie Heilman, DCB
   Sandy Klein, DSU
   Katie Nettell, LRSC
   Shirley Hanson, MaSU
   Dale Gehring, MiSU
   Shelley Blome, NDSCS
   Jeanette Enebo, and Bonnie Litton NDSU
   Robin Holden, Kellie Leake, Angela Osborn, Bruce Helgerud, and Rohit Kulkarni, UND
   Betty Schumacher, VCSU
   Lynn Haverlock, WSC
   Sue Applegren, and Dennis Junk, Campus Solutions
   Peggy Wipf and Gina Padilla, NDUS

Approval of February 17, 2011 CUSAD meeting minutes
The minutes of the February 17, 2011 CUSAD meeting were approved by consensus.

Pell crossover
Dennis Junk thanked UND for their input on a report which will show which students need a crossover Pell. Dennis mentioned that this topic is on the agenda of the Alliance Summit he will be attending later this week, so he will be looking for additional information. He said PeopleSoft is planning to make changes so the cross-over Pell is put on 2012 student records. He said he will know more after the Alliance Summit. Sandy Klein stated that based on different federal budget scenarios, it is possible that the year-round Pell may not be continued. Dennis said he would distribute information he receives from the upcoming Alliance Summit.

SAP Comm – Event ID letter code update
Sue Applegren reported that spring letters were not picking-up students if they were disqualified for fall and then disqualified again in the spring. Sue said they have implemented term specific letters to resolve this issue.

SAP changes to accommodate new regulations
Jeff Jacobs asked what the SAP committee’s implementation suggestion is for the new system which goes from warning to disqualification. Sue said information will be distributed to describe what has to be changed. The only status in the setup is warning and disqualification. Sue said schools will need to update their letters to comply with the new
regulations/terminology. In response to a question from Dale on if they were going to have the option of setting the student’s record to probation status, Sue said it will be available but only as an override and not as an initial condition. Sue said the instructions will be distributed prior to July 1.

**DR and remedial credits**

Sue said when she talked to PeopleSoft they stated that they did not understand why they would want to include remedial courses if successfully completed. Sue stated that schools do have options as to whether or not to include remedial courses for FA purposes. Sue said the campuses need to indicate if the student credits should be linked to the student record and if they should be counted toward the max attempted units. Robin Holden asked if the campus has the ability to override the option if they do not accept remedial courses toward financial aid eligibility, and Sue said this is possible.

In response to a question on if students enrolled in all pass/fail classes would be disqualified for not meeting the GPA requirements, and Sue stated that if a student is only enrolled in pass/fails, the SAP test for GPA would be passed over and the next test would run.

**ISIR data retrieval tool – how to use with current processes and ISIR comment codes – 272,297,300**

Jeff said he received a call on how the different comment codes work, for the 401, 501, 402, or 502. Jeff was wondering how he will be able to tell if the parents used the IRS retrieval tool. Dennis said these codes were only used for the 2009-10 year and they will not exist in the current year. Dennis said they will be writing a report to identify the students and there will be a series of checklists tied to the process.

The group suggested reviewing the priority deadline because of the IRS data download changes. Peggy Wipf said if the group is interested in changing the priority deadline, it would have to be decided soon because deadline information must be provided to the DOE in October. Peggy suggested that this be discussed at NDAFSA so all schools have a chance to comment. In response to a question on the impact changing the priority date would have on the state grant program, Peggy said if the date is pushed back and SSIG funding remains stable it would not have a big impact.

Peggy said state grant funding should remaining stable, but carryover is possibly going to be stripped. Sandy asked if carryover funds could be awarded for summer, and Peggy said the current growth is too new to make those adjustments. Peggy said the earliest the awards for 2011 could be made would be the 3rd week of May. She announced that the letters and some of the campus reports have been reformatted.

**Data Dictionary Update**

Dennis said the data dictionary is tied to the data warehouse. The warehouse is where data is pulled into an environment which allows the data to be analyzed. Dennis said financial aid is just a small part of the student financials. The data dictionary will be used when information is
pulled from the data warehouse, so users have a common understanding of what the data elements mean.

**Affordability Report information and its value**
Peggy Wipf said she would like to know if the financial aid offices use the information within the affordability report published by the NDUS. Peggy described the data included in the affordability report, as well as the information that is available in the NDUS accountability measures report. Katie suggested that these two documents be forwarded to the council members so they can review the documents and provide feedback. It was agreed that this would be put on the next CUSAD agenda.

**Repackaging if the Federal Government adjusts the PELL amount**
Dennis said if repackaging is necessary due to federal adjustments to the Pell, a plan is in place that will repackage students if changes are made. If loans have been originated it will be more difficult to repackage, so the council may want to discuss delaying origination. Dennis said it will not matter if many schools change origination to coincide with each other. Dennis asked the campuses to let him know when they plan to run loan origination and disbursements, especially to ensure that NDSU and UND do not run on the same days because of system load capacity. Dennis asked if the schedule for incoming and outgoing files is working for the campuses or if it should be revised. The campuses didn’t identify any major concerns, but said they would continue reviewing the process.

**Aid Year Roll-Over**
Dennis asked for the preparation status for aid-year roll-over, but the campuses stated that they weren’t prepared to provide a status update.

**Direct Loan fees, origination/refund codes**
Dennis said the fees do not change on July 1, 2011, but if you are going from an ORE (even year) to an ORO (odd year), the data possibly contains old fees and will need to be updated. He said it should be 1% origination and .5% percent rebate and that the information is hidden under awards.

**Summer processing**
Rohit Kulkarni asked what the timeline is for programming the cross-over Pell, but Dennis did not currently know but said he inform the group once he finds out. Dennis said at the federal student aid meeting they said it should be done by projected award, not by EFC.

**Checklist for missing transcripts used in disbursement process**
Dale Gehring said his registrar asked him why they don’t use checklists to see which students are missing transcripts to prevent the student’s funds from disbursing. In response to a question from Sandy, Dale said those records are maintained on the academic records side. Dale asked how the admissions records could be used to set-up checklists for financial aid purposes. Dennis suggested that Admissions and Student records be included in this decision since, the checklist is only useful if the student records and admissions officers use them.
Dennis said if security roles are allowed by the admission and student records, financial aid can then use those checklists to define a role.

Comm standard portal to view comm.
Rohit Kulkarni said they were looking at having a common portal that would work on the student side as well as the financial aid side. They are waiting for the next conference call to get feedback from the group. Jeff Jacobs asked if this would be used for all student communications, and Dennis said it will work if Comm Gen is used. Dennis said they will have to have a committee with members of other user groups to work through the process.

Scholarship Stipends
Robin Holden said groups from grants, finance, and student finance discussed concerns about how to process payments for students who receive multiple payments per semester. Currently they are paid through accounts payable but are not picked up with 1098T process, so they are discussing how they can be paid through financial aid. Dennis said to accomplish this they would need to add a packaging plan with multiple disbursement id’s with a date set to the beginning of each month and disbursement would have to be run in a timely manner. In response to a question from Robin, it was agreed that all payments should come through financial aid as long as the payments are not for work performed.

Other Business
Valerie Heilman asked for guidance on how a two year college could provide financial aid for 300 & 400 level collaborative classes. Betty Schumacher said once students are done with the two-year courses, the 4-year school would have to be the financial aid disbursement agent. Sandy Klein said information on this should be available in the school’s participation agreement.

Peggy said CUSAD has provided feedback on student loan indebtedness and now Sue is going to check if there is a way to include endorsed manual checks. Sue said if the manual check was not run through the student disbursement process, there is nothing in the system that could be captured. Jeannie suggested that campuses make sure their undisbursed awards are removed prior to the report being run. Jeannie suggested using the gross amount and not the net, because this would make a difference in the reported dollar amount. Peggy confirmed with the group that if the unendorsed amount can’t be captured, they should use the gross amount instead of the net amount. Peggy asked if the student loan indebtedness is an item that should be included in the affordability report information, and CUSAD agreed that it should.

Rohit said the 248 code on the ISIR is a warning that you are coming close to the students aggregate loan limit. Rohit said recently the academic code has been changed, and he was wondering why the severity level has been increased and what is being done with ISIRs with the 248 code. Jeff said there is a query that can be run against the comment codes, and the reason the severity level was raised was to ensure they would not be over awarded. Robin stated that if they reach their limit, the system will catch them and not allow over awards. Jeannie Enebo made a motion, Shelley Blome seconded that this item be discussed at the next meeting and
that in the interim the campuses gather additional information from their offices. The motion passed unanimously.

UND asked Dennis a question about Perkins checklists and award disbursement. Dennis asked that they submit a ticket so Campus Solutions can investigate this further.

Robin said she was wondering what checklist items are pulled for verification follow-up letters and checklist items. She asked for additional checklist items (schedule c, f, k-1, signature on tax form and signature on worksheet). Rohit said the code that was being used for the follow-up letters was closed with the work ticket and has been lost. He was wondering if anyone else has had problems with this. Bonnie Litton asked if the campuses could be allowed time to review this issue until the next CUSAD meeting. Robin said she would initiate this as an email for the CUSAD to review and make suggestions.

Old Business:
Creating FA job sets; FA term & ISIR load
Dennis said the ISIR load program is working but the ISIR load report is not. He said he would let everyone know when the process is successful. Dennis said schools can look at an ISIR cross reference report that shows the ISIR’s that did not load and why. He also described how Query 98 can be used to identify how many ISIRs have been received.

FA term build
Jeannie Enebo said she can’t get this report to run for 2011 even after setting up a new run control and having Sue do some work on it. Rohit confirmed that he had encountered the same problem. Dennis said he would check if there was anything in the bundle that would have affected the term build.

Adaptation of NDU_0053 Post Census Class Load to NDU_0053_1
Jeff said this is working as intended. It picks up students with federal aid if they drop a class before it starts and it will identify summer students that have multiple class start dates.

Repeated course in SAP
Dale asked if the repeated course indicator in the student records system could be used to show that the student is trying to attempt the course for better grade. It was mentioned that this topic would be discussed at the Federal Regulations training on the following day.

SSIG update
Peggy had provided an SSIG update during the IRS data retrieval agenda item discussion. Sandy asked what will happen if the Federal Government ends LEAP funding. Peggy stated the approximate number of students this would affect and said impact statements were given to the delegation.

Net Price Calculator
BSC, NDSCS, UND and WSC have the net price calculator available on their websites. Sandy asked what costs are associated with implementing the calculator and Dennis said the calculator is free, but there may be a cost to upload the data to the campuses website.

SBHE encrypted email
Gina Padilla reported that Randall Thursby has confirmed that all email using the NDUS BPOS exchange service has encryption in place, as well as the Exchange mail services at VCSU, MiSU and MaSU. She said the encryption is only in place when the sender and the receiver of the email have encryption in place. She said users should ensure both parties are on the BPOS prior to sending emails requiring encryption.

NDASFAA President Elect
Sandy asked that anyone interested in running for president elect contact her.

Adjourn
It was moved by Katie, seconded by Shirley to adjourn the meeting. The motion passed unanimously.