

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Financial Aid Functional Team

Date: 2/7/2006

Time: 9:30 am

Place: Financial Aid Conference Room

Attendees: Tracy Hall, Dian Ensign, Nancy Dole, Patti Bailey, Deanna Kelly

Note Author: Tracy Hall

Agenda and discussion items

- **Training schedule/vacation requests**
Consulting starts week of March 20. Supervisors should take into consideration Banner consulting sessions when approving vacation and make staff aware consulting session dates can be changed by SCT for any reason. Also remind staff that work on the system may be required outside of the consulting sessions (i.e. building tables, testing routines, etc.)
- **Implementation kick-off**
We talked about having a small kickoff event/staff meeting before consulting starts to motivate staff and explain consulting schedule, etc. Dian suggested a team building exercise we will include. Tracy will set up laptop with projector to show the “look” of Banner. We want to try and get all staff to attend 1st day of consulting to gain basic knowledge on how to navigate Banner system. We will talk with Jone about closing the office March 21 for this purpose.
- **Compensation plan**
There is a Banner compensation plan designed to award bonuses to staff that contribute to reaching major milestones while building the system. Our plan has not been approved by the Steering Committee.
- **Common Matching discussion**
We will create general person records during the matching routine used by our Pell tape load. We discussed having only one rule matching on SSN and DOB. We do not think we will be creating general person records on-line. We do have concerns about being able to enter awards for students who are not admitted and not considered “students”.

Decisions Made

Decisions for referral

Ask Jone about closing office on March 21...she will need to get approval from VPSA.

Tabled/Future discussion Items

Attachments and/or meeting Handouts listed:

Banner Document repository instructions

Common matching handouts from other institutions and user guide

Revised consulting schedule