

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Financial Aid Functional Team

Date: 5/10/2006

Time: 2-4 pm

Place: ITS Conference Room

Attendees: Hall, Tracy; Ensign, Dian; Dole, Nancy; Kelly, Deanna; Toner, Marsha
(substituting for Bailey, Dave, who could not attend) and Zieren, Jone

Note Author: Zieren, Jone
5/11/06

Agenda and discussion items

- Database Test Instance

Team Lead Hall discussed how we need to clean the data base before our consulting visit next week. Hall and Bailey attempted to cleanse last Monday but “scrubbed” too much data. Technical consultant Dan DeBower is willing to do it for us on Friday, May 12. During a meeting Hall and Zieren had with Mike Delaney, Mike encouraged us to use Dan since he is familiar with the script.

- Agenda for consulting visit next week

Team Lead Hall will be sending us a revised agenda for the consulting visit next week.

- Student module time-line

Dave Bailey sent Hall a “gant” chart showing the student module time line. Hall will copy and distribute to each team member.

- Discuss entering requirements tracking tables and testing

Team members working on the requirement tracking table will meet on Monday and prepare spreadsheet for test next week.

- Discuss budget grouping

Ensign and Zieren presented the “start” of the budget groupings for review by team members. Position 1 will identify undergraduate or graduate; position 2 will identify residency; position 3 will identify living arrangements; position 4 will identify enrollment; and position 5 will identify enrolled hours. They proposed using an average tuition and fees for all tuition plans and average enrolled hours based on full time, part-time, and less than half time from 1 – 5 hours. More work will continue on fall only, spring only, and mixed hours budget groups.

**EISE Project Meeting Notes
Eastern Illinois University**

OTHER TOPICS

Meeting with Delaney:

Hall and Zieren discussed their meeting with Delaney. Primary topic was the issue of consultants, and change from Bellin to Kramer. Delaney does not like using multiple consultants for modules. Hall explained that we noted both Kramer and Skelley since our team preferred Skelley's experience compared to Kramer. Delaney will check to see if Bellin can still attend some sessions even if just for one of the three days. Hall suggested another consultant who Delaney said is good but may not be available. He will follow up with Hall. The "cleansing" project was also discussed, and Delaney will meet with Kathy Reed for final determination.

Cross Functional Group Meeting:

Hall gave a summary of the cross functional group meeting on Monday, March 8th. Highlights included the student module will be using college net for admissions. The interface with banner will be performed by NOLIJ (pronounced knowledge). A demo is being given on May 19th which Hall will attend since NOLIJ can perform interfaces with any module.

A new Data Standards Team has been created to be the permanent team since the data standards document is a living document that will change during implementation. This is a smaller committee and Hall will be our representative. Linda Coffey will lead this new team.

Reporting Standards Team draft document is on the web for review.
Data Custodians Team is drafting a document.

Reports in training and test will be purged in 15 days from creation.

Self Service Team (Tony Spivey is a member) has created a web site for review. Vicky Phillips is the chair of this team.

On line common matching will not affect us since we will not enter on line into the general records. This is a different routine from the financial aid module.

The alternative ID as SSN will disappear eventually but probably not for several years.

Non EIU email to be converted was requested by Linda Coffey for students with outstanding balances or deposits on file.

Records Office will be responsible for maintaining student addresses. Housing will maintain the on campus contracts and want a separate address for their use only. A meeting will be convened with the Student team and Housing.

**EISE Project Meeting Notes
Eastern Illinois University**

Records Retention – information provide to Hall from Ensign

Degree Audit Requirements – information provide to Hall from Ensign

Decisions Made

Recommend that Dan DeBower proceed with the scrubbing process.
Continue work on budget groups.

Decisions for referral

Decision regarding scrubbing will be made by ITS.

Tabled/Future discussion Items

Requirements Tracking Milestone

**EISE Project Meeting Notes
Eastern Illinois University**

Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
	Consider time-line issues for ITS and inform Dave Bailey through Tracy if any others should arise	All team members		

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
	Questions for Degree Audit team for Financial Aid	Dian	5/10/06	completed
	Completing RTVTREQ form and RORMESG form in Test.	Patti Cindy	5/14/06	

Attachments and/or meeting Handouts listed: