

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 6/28/2006

Time: 2-4 pm

Place: ITS Conference Room

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

Note Author: Patti Bailey

Agenda and discussion items

- **Requirements Tracking/MIL letter**

July 10th is the date set for testing requirements tracking

Tracy is writing the rules for the tracking groups

We have added a PJ tracking group and are checking with other schools on their process for EFC changes

A new code of D for denied has been added for the TIV (previously BR)

Patti will be working on the RTVMESG and RORMESG

Patti and Tracy will be working on the Policies and Procedures for document tracking

Patti will work on the MIL letter in Word merge

- **Needs Analysis/Verifications**

There needs to be testing done on the needs analysis and verification process

Patti will get a current verification process from Cindy and arrange a morning for Shelia to do some data entry

- **Budget Groups**

IT will scrub the budget tables in test – Tracy is checking with Dan DeBower on this.

Tracy has revised the aid periods and will check on an aid period with summer as the leader.

Jone and Dian will be working on the budget validation tables. They will have prepared for the team to review at the next team meeting

They will look into the possibility of making summer a budget component but the summer budgets will be tabled until a later date

- **Funds Mgmt**

Tracy will be working on the crosswalk and will run it by the team

- **ROAINST credit hours**

Tabled until a later date

- **Staff training**

We need to work on developing a training schedule for the training of current employees

- **Conversion consulting**

Tracy will make a timeline with a Gantt chart to use as a schedule for conversion

Award history will be converted from 97/98

The only requirement tracking that will be converted in the DRC and BR

Banner will only need one subcode for loans so all loans will be converted into one subcode

The fundcodes will be crosswalked from Plus to Banner

All archived SAP will be converted

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Entrance and Exit interviews will be converted with a date of 01/01/2007 used for conversion

Decisions Made

We will not be attending U of I to evaluate their MAP process due to they have their program written in a different language.

Decisions for referral

Tabled/Future discussion Items

Requirements Tracking Milestone

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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		
	Complete RTVTREQ and RORMESG form in Test.	Patti, Cindy		In Process
	Policies and Procedures for Document Tracking	Tracy, Patti		
	MIL Letter in Word Merge	Patti		
	Budget Validation Tables	Jone,Dian	7/12/2006	
	Test Needs Analysis and Verification Process	Patti, Cindy, Shelia		
	Staff training schedule			
	Conversion timeline with Gantt chart	Tracy		

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
	Empty Suspense File	Dian	6/7/2006	
	Email HR/Work Study concerns and reporting needs to Joy Craft	Tracy/Nancy	6/7/2006	In process
	Send Mary Herrington-Perry email regarding DARS and Financial Aid	Tracy	6/7/2006	
	Contact Sue Harvey regarding security access to veterans information	Tracy	6/7/2006	Complete
	Requirements Tracking Test		7/10/2006	
	Check with Sandy Bowman to see if we can get an open lab for Financial Aid	Tracy		

Attachments and/or meeting Handouts listed: