

**EISE Project Meeting Notes**  
**Eastern Illinois University**

Team/Group: Financial Aid Functional Team

Date: 7/12/06

Time: 2-4 pm

Place: ITS Conference Room

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

Note Author: Patti Bailey

**Agenda and discussion items**

- **Open lab time** – Sandy Bowman said the lab in Old Main has been made available to some units. Tracy has asked for Friday mornings and Sandy is checking on availability.
- **Scheduled Banner down time** – IT is planning a scheduled downtime for Banner on Sunday mornings from 8:00-10:00
- **Next week's consulting visit** – At the next consulting visit we will have someone there from the student side for the information on SAP. Two employees from payroll and Lorraine will attend for the information on student employment. Tracy will check with Marla to see if Cindy needs to be there for the C Codes.
- **Update on common matching/dataload** – The student side (Sue Harvey, Vickie Phillips) have asked that they determine the common matching for our tape loads. The rules they proposed are:

- First 3 of last name
- First 1 of first name
- First 6 of SS#
- Birthdate

Tracy loaded 1 day (77 records) and 5 went into suspense. She will run a couple more tests and discuss with Marla.

We need to look at what reports the dataload creates and determine what other reports are needed.

- **Update on Requirements Tracking (Rodney Ranes to update on admin codes)** – Rodney discussed the admin codes with the team. We will pull our data from the admissions types. If they have a Masters and PBT Grad would be primary with the PBT secondary. We would still have to check these classes manually.
- **Update on Budget groups** – Dian and Jone passed out the budgets. There will be one budget based on hours regardless if they are on-campus or CE. We will start entering budgets on the 31<sup>st</sup>.
- **Update on Needs Analysis/Verification** – Patti needs to print tax forms and W-2's from on-base and enter into Banner.
- **Update on Funds Mgmt** – Tracy handed out the crosswalk she had prepared for the subcodes. The team needs to review them and get back to Tracy.

**EISE Project Meeting Notes  
Eastern Illinois University**

**Decisions Made**

Starting with Banner the DRC code will be a selective service request for students for Title IV aid. We will need to verify students with State Aid and scholarships by entering an SSV. A female can be waived. We will roll 07 Y's over from 313.

**Decisions for referral**

**Tabled/Future discussion Items**

Requirements Tracking Milestone  
ROAINST credit hours

**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		
	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:**