

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 8/2/2006

Time: 2-4 pm

Place: ITS Conference Room

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

Note Author: Patti Bailey

Agenda and discussion items

- **Requirements tracking** – We are still testing requirements tracking. Patti and Tracy will work on 2BA's. Patti is working on the MIL letter.
- **Entering and testing Budgets** – All budget groups are defined and we are ready to start entering budgets. Dian will enter the groups on the group validation tables.
- **Verification** – We will ask on list serve how other schools are verifying discrepant information. Patti and Cindy will compare our current verification process to Banner's verification process and note differences.
- **Funds Management (Fund crosswalk)** – the team worked on the Funds management crosswalk. It was tabled for everyone to review.
- **Packaging Groups** – Jone and Dian will work on the packaging groups.
- **Transfer Monitoring** – We all need to review the NSLDS info in the workbook
- **SAP** – The rules are written and will be tested after academic history is loaded. Deanna will do the testing.
- **Training** – We will need to start training staff on the use of Banner by November 1st

Decisions Made

Dave will be added to the agenda to allow him to address items he needs discussed.

Decisions for referral

Tabled/Future discussion Items

Requirements Tracking Milestone
ROAINST credit hours
Funds Management Crosswalk

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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		In Process
	Budget Validation Tables	Jone,Dian	8/18/2006	
	Test Needs Analysis and Verification Process	Patti, Cindy, Shelia		In Process
	Staff training schedule			
	Conversion timeline with Gantt chart	Tracy and Dave	8/16/2006	

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
	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	
	Requirements Tracking Test		9/1/2006	
	Packaging Groups	Jone/Dian		
	SAP testing	Deanna	Once academic history is loaded	
	Banner training plan	Tracy/Patti		

Attachments and/or meeting Handouts listed: