

EISE Project Meeting Notes Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 8/9/2006

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

- **Funds Management (fund crosswalk)** – The team reviewed the Funds Management crosswalk and made final corrections. Tracy will enter them into Banner.
- **Requirements Tracking update** – Patti and Tracy still need to get together on 2BA. Tracy has an e-mail out to Marla checking on some information we need for the MIL letter. Some of the mnemonics need to be revised due to RORMESG. A deadline of September 1st has been set to have Requirements Tracking completed.
- **Entering and testing Budgets update** – Dian has one page of the budget groups entered and will have the rest completed by Friday. Tracy will ask Bill Witsman if it would be possible to have Emily assist us in entering budget information. A deadline has been set to have budgets tested a couple of times by September 1st.
- **Rules for budget groups** – Dian will get the finalized budget information to Tracy and Tracy will start writing the rules. This also has a deadline to have completed by Sept 1st.
- **Verification update** – Patti, Cindy and Dian will start meeting on Mon, Wed and Fri at 8:00 to working on the verification process.
- **Packaging Groups** – Jone and Tracy are working on the Packaging groups and will have at least one packaging run tested by September 15th.
- **Frozen Hours** – Tracy will post a message on the list serve to see if other schools can tell us the consequences of not freezing hours.
- **Parts of Term** – The student side has discussed the need to make some changes in the start and end of terms to accommodate Continuing Ed. There was discussion on the possibility of using Parts of Terms. Tracy will contact Sue to see if we can setup a meeting to meet with them on these issues.
- **Financial Aid Timeline** – Tracy and Dave have a meeting on Friday morning to establish a Financial Aid timeline.
- **Update by Dave Bailey** – All conversion programs will be written by the end of the week with the exception of the Funds Management (Financial Aid team needs to complete crosswalk).

A MAP subcommittee has been formed consisting of Dave Bailey, Cindy Fearday, Patti Bailey and Jenny Stout. (Dian will be available for consulting) The first meeting will be on August 15th at 9:00 AM in the Financial Aid conference room.

Decisions Made

Decisions for referral

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Eastern Illinois University

Tabled/Future discussion Items

Requirements Tracking Milestone
ROAINST credit hours

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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	9/1/2006	In Process
	Policies and Procedures for Document Tracking	Tracy, Patti		
	MIL Letter in Word Merge	Patti	9/1/2006	In Process
	Budget Validation Tables	Jone,Dian	8/18/2006	
	Budget Rules written	Tracy	9/1/2006	
	Test Needs Analysis and Verification Process	Patti, Cindy, Dian		In Process
	Staff training schedule	Tracy/Patti		
	Conversion timeline with Gantt chart	Tracy and Dave	8/16/2006	
	Packaging Groups	Jone/Tracy	9/15/2006	
	SAP testing	Deanna	Once academic history is loaded	

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	Complete
	Send Mary Herrington-Perry email regarding DARS and Financial Aid	Tracy	6/7/2006	
	Requirements Tracking Test		9/1/2006	

Attachments and/or meeting Handouts listed: