

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 9/6/2006

Time: 2-4 pm

Place: ITS Conference Room

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

Note Author: Patti Bailey

Agenda and discussion items

- **IT update from Dave** – HR has a sub team that will be looking at reports and forms. We might want to look into organizing a sub team for this purpose. The student team is bringing in a consultant for academic history conversion.
- **Requirements Tracking update** – We need to push back the Requirements tracking milestone until we are updating for 07/08 since the Grad office is still working on 2BA and PBT. Tracy, Patti and Cindy will be working late tonight to test and work on RORMESG.
- **Budgeting update** - Emily will have everything entered today on budgets. Tracy is still working on the rules.
- **Verification update** – Verification is still in process. We need to check with Marla on how they get cleared for packaging.
- **MAP update** – MAP is still in process.
- **Funds Mgmt update** – Emily has entered the awards. History will be completed soon.
- **CED update** – Tracy sent Kim a list of students for test cases. They should be done by next week. Marla should be working on these during consulting and assuming they are using parts of term.
- **Next consulting visit** – We will have a remote consulting session with Dan DeBower on October 17, 18, 19. We need to check on Form Fusion with finance.

Decisions Made

Decisions for referral

Tabled/Future discussion Items

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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	In Process
	Packaging Groups	Jone/Tracy	9/15/2006	In Process
	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: