

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 9/13/2006

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** – Phil is working on the document tracking reports Tracy requested in crystal.
Awards were loaded from PLUS to Banner. The team needs to review students to be sure they are ok in RPAAWRD. Direct Sub loans are combined by year with a tab by term. Comments are converted from 348 to RHACOMM.
They are waiting on some cleanup for SAP conversion
Still need some information on Perkins MPN, entrance and exit interview.
Still working on MAP.
Dan DeBower will be here October 17,18,19 so we need to work on a agenda for him,
- **Conversion** – The team needs to check award history conversion, SAP problems and talk to Cindy about duplicate records.
- **Requirements Tracking update** – There is a problem with the students that are not admitted. Tracy has worked on the rules and they are ok now. Patti, Cindy and Tracy will be testing on Monday afternoon in the Union. We need to talk to Dan or Marla about EFC changes and verification. We are waiting to hear from the Grad office on 2BA and PBT.
- **Budgeting update** – All tables are entered. Tracy has written the rules and is still working on the PELL budgets. We can pull residency from the student master in Banner. If there is not a student file we will assume In State. The test on budgets ran ok. We need to ask Marla about the verification complete date.
- **Verification update** – no update
- **MAP update** – no update
- **Next consulting visit** – The next consulting session will be in Gregg Triad. Tracy has e-mailed Marla the following issues we would like to discuss.
 - How can we package, disburse, budget continuing ed and part of term – Linda will be there to withdraw so we can do R2T4
 - Review budgets
 - Guidance on hours – how do the hours get there if not enrolled
 - Help on letters
 - The budget rules are currently using adjusted hours. Need to review ROAENROLL and the credit, billed and adjusted hours.
 - We still have a question about freezing hours/starting out with billed hours.
 - Check with Marla on packaging groups
- **Timeline** – We need to set time aside to test as a group
 - We need to do some testing on Friday from 8:00-10:00

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There will be an ODS consulting session with the following schedule:

Day 1 – 8:30 – 10:15 Tracy, Jone, Nancy
10:30 – 12:00 Tracy, Nancy

Day 2 - 1:00 – 2:45 Implementation team

Day 3 - 10:30 – 12:00 Tracy, Jone
1:00 - 5:00 Tracy, Jone

Decisions Made

Decisions for referral

Tabled/Future discussion Items

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	Complete
	Budget Rules written	Tracy	9/1/2006	In Process
	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	Status

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			Date	
	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	In Process

Attachments and/or meeting Handouts listed: