

EISE Project Meeting Notes Eastern Illinois University

Team/Group: Financial Aid Functional Team

Date: 9/29/2006

Time: 9am

Place: Martinsville 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** – Cindy is cleaning up SAP. The team needs to check award conversion and if ok it can be deleted for 06/07 before Marla comes back
- **Next consulting session** – The next consulting session will cover loans – everyone from loans will attend on Tuesday and Wednesday and Linda will cover Laurie's phone. We will cover PELL on Thursday and Cindy and Jenny will attend.
- **Hours discussion** – We will use user defined fields in the same way we now use 325. We will populate the user defined fields when put in budgets unless they are already populated with a scholarship. After 10th day we will start packaging on billed hours and run a discrepancy report to catch if scholarships are different.
We will use attending hours for disbursement – we need to test to be sure ok.. Starting in July we will run a discrepancy report before each billing and revise hours and aid. We will also test locking funds and repackaging.
- **Freeze date (ROAENRL)** – We will update financial aid hours everyday.
- **Disbursement cut off date** – We will disregard, backout, disregard

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	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 Date	Status
	Email HR/Work Study concerns and reporting needs to Joy Craft	Tracy/Nancy	6/7/2006	Complete
	Requirements Tracking Test		9/1/2006	In Process

Attachments and/or meeting Handouts listed: