

**EISE Project Meeting Notes**  
**Eastern Illinois University**

Team/Group: Financial Aid

Date: 11/29/2006

Time: 2:00 pm

Place: ITS Conference Room

Attendees: Tracy Hall, Dianna Ensign, Deanna Kelly, Nancy Dole, Dave Bailey, and Jone Zieren

Note Author: Jone Zieren

**Agenda and discussion items**

Update:

ITS update from Dave – Cindy has been working on the tables for MAP Dec. 4<sup>th</sup> production will be copied to pre prod

RTVHOLD – Tracy noted that we can have as many hold descriptions as we want; problem that whoever puts on the hold must take off the hold; if we use a generic hold the person placing the hold would need to place initials on hold for identification purposes; also discussed “memo aid” which shows as anticipated aid on the student’s bill but does not reduce the balance until disbursed against their account; if we do not memo aid the accepted aid will not show up on the bill which would be very confusing for students and create more phone calls. If the student has “authorized aid” it will show on the bill and also reduce the balance. Authorized aid means everything is ready and waiting for disbursement. Decision: We will use a generic hold. Dian will load and Tracy will test three types of holds 1) disbursement hold 2) packaging hold (will this cause other aid to not be entered ?) and a memo hold. We want to limit the number of hold types and also limit the number of staff who can place holds. We need to memo aid.

General messages need to be added to the agenda for next week’s meeting.

Banner Address Types were discussed. We must use the general person address unless we are creating the person in the system. Jone will contact Sue Harvey for more information on where address is pulled for general person, and date addresses will be loaded.

FOLLOW UP 11/30/06: Per Sue Harvey, general person address will come from the admissions application and designated as SM address type. Therefore student address (SM) could be local, permanent, or home. Once a student has a local or campus address the SM will be updated. Student module will be suggesting a “contract” address that will only be updated by Housing.

Addresses will be loaded January 1<sup>st</sup> 2007.

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Mailing address will not be used for students since it is a vendor only address and some students are classified as vendors.

Request for schedule file form: Tracy has prepared and will forward for appropriate signatures.

Funds Mgmt: Jone completed task for assigning disbursement on each fund for 100%, prorate, or no disbursement based on attending hours. If a fund was based on hours enrolled, the "no disbursement" option was selected. Loans can not be prorated.

Packaging: Tracy has been testing packaging and rejected ISIRS will not package. Documents must be satisfied and a budget must exist for packaging campus based aid. When funds for SEDS are exhausted, student will be packaged for FSEOG. We do not need a "no need gift aid only preference" packaging status. Tracy will test one semester only budgets. We discussed loans. See decisions made below.

Training: Jone reviewed the overview demo for SunGard product for Computer Based Training (CBT). It appears that Bill Witsman will purchase for the campus and it will be loaded on a designated server. Jone and Cathy have been working on overview training materials for the staff. Emily will be working with Tracy on loan training materials and use of camtasia as a training tool.

Proposed Christmas Break Training (depends on when we can close the office)

First Day: Overview of Banner with all staff required to attend. Tracy will coordinate a FA Banner Team approach for training the staff on overview.

Security and access will need to be obtained. We will train in "test" instance.

Second Day: Refresher on overview and work in teams as a "fun" event. Nancy and Tracy will coordinate. Dian will train on the cross walk.

Third Day: Train on new cycle and changes from current system to Banner. Give brief instructions on Data Load, Requirements Tracking, Need Analysis and Verification, Budgeting, Packaging, and Loans.

Fourth Day: Specific training based on responsibilities.

Team decided to wait on finagling training until we can view the CBT demo on Financial Aid, and office closing date.

Reporting Tool: Tracy has received a crystal license.

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**Decisions Made**

We will have a generic hold.

We will memo aid.

We will offer loans to all students.

We will not have a loan fee unless in case of PJ or over award.

We will offer PLUS to all dependent students with minimum award of \$4000 in auto packaging.

**Decisions for referral**

**Any more hold descriptions needed?**

**Final Training schedule will be determined after CBT demo.**

**Tabled/Future discussion Items**

General messages

Staff training over Christmas break