

**EISE Project Meeting Notes  
Eastern Illinois University**

Team/Group: Financial Aid Functional Team

Date: 12/6/06

Time: 2-4pm

Place: ITS Conference Room

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

Note Author: Jone Zieren

**Agenda and discussion items**

**Summit 2007 will be held March 19 -22 in Las Vegas. Tracy and Patti will be attending.**

- **IT update from Dave: The first award for MAP can been entered. Tracy will ask Marla about the disbursement schedule for MAP and if it will auto populate. Production has been cloned to pre prod and scrubbed.**
- **Discuss new schedule file form: The new form will be a combination of both of our current screen 325 and the schedule file. It will include the total number of hours packaged with a breakdown of regular, continuing education, sponsored credit, and cost recovery classes. It will also display the current SF of the student. Each column must match before disbursement will occur. Tracy will check with Student to see how they will identify Study Abroad classes.**
- **RTVHOLD follow-up: Tracy tested the packaging hold and it will prevent anything from being entered as a packaged award if it is placed. Holds can be released by anyone if it is not locked. Team added special reason holds to RTVHOLD.**
- **Next week's visit/homework: Next week's consulting sessions will be in the Martinsville Room in the University Union. Tracy is preparing the agenda: loan follow up, entrance and exit requirements, FPerkins MPN process, short term credit, and continue testing.**
- **Training materials: Jone presented draft of Overview for training staff. Tracy will circulate to all members of the team. Comments and suggestions should be directed to Jone. All training materials and a schedule should be ready by December 15<sup>th</sup>.**

Overview	Jone
Crosswalk	Dian
Specific Processing Tasks	Patti
Scholarships	Patti, Nancy, and Deanna
Loans	Tracy

**Possible Schedule:**

**December 20 and 21 Overview and Review with Fun Exercises**

**December 22 Crosswalk and Common Functions**

**December 27 Processing Tasks**

**December 28 Scholarships, Loans**

**December 29 Review of System and Practice Exercises**

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**Decisions Made**

**Holds to be used**

**New Student Schedule Form design**

**Decisions for referral**

**Training Schedule**

**Tabled/Future discussion Items**

General Messages