

SF User Group Minutes
March 19, 2008
(no meeting held in February)
Recorded by WSC

Attending: BSC, DSU, LRSC, MASU, MiSU, MiSU-Bottineau, NDSCS, NDSU, UND, VCSU, WSC, HECN-Angela and Marie

1098T Processing

Marie will run the process for IRS the middle of next week, Wed or Thurs. Don't make any changes after March 25. She will run a sequel to check for any negative signs and notify the campus if needed. Any changes needed after that date will need to be done as corrections. Marie suggests we keep a list of any changes made to use as a check against the corrections run she will do in April/May.

Touchnet Payment Plans

According to the preliminary plan, Touchnet payment plan discussions will begin after 3rd round testing is completed, sometime in May.

Chelsea brought up concerns they have with trying to implement the Touchnet Paymnet Plan for fall semester. Will a good workable product be ready for fall semester? Do we need to delay implementation so the product is fully ready for students? Do we have the time and resources to participate in testing and implementation?

Angela reminded everyone that the legislature was told we would be live for Fall '08, there would be a payment plan in place for students to use.

Some campuses plan to use the Touchnet Payment Plan, others do not. Can we all use different plans? It adds to complexity issues. CAC group is looking at this issue.

After much discussion, it was decided to begin meetings after 3rd round testing, sometime in May as stated in the preliminary plan. We may need to delay actual implementation until spring, but we will start the process in May; keeping in mind the concerns voiced by UND.

9.0 Testing

Angela stated she was able to successfully print a corp statement. In 9.0 a contact name will need to be associated with the org. We will go over this in detail at the April training.

To prepare for testing email Angela two org numbers and a contact to associate with them (can be person or department name).

There are new procedures for refunds in 9.0, training manuals and test scripts are being developed. A separate time will be set aside during testing for refund training.

Summer Tuition Calc Batch Process

0840 batch tuition calc will begin Sunday, April 27. 0830 required only will occur on Saturdays after that date.

Other

Query 119 is not working for Chelsea-suggested to try running with one item type at a time, or shortening the item type range.

Calendar dates—last date to drop w/o notation is 10th day in fall semester and 11th day in spring semester.

Alliance Conference

Karin gave us highlights on information she learned while attending the Alliance Conference.

- A) In the current system, the 'anticipated' financial aid that is viewed on customer account can be changed to show 'offered', or 'accepted' or 'authorized'. This might be something to discuss with your financial aid dept, to see what would work best for your campus.
- B) External Aid processed through Student Finance instead of through FA in 9.0 (Waivers, scholarships, third-party billings) This is a new feature and may not be available right away.
- C) In current system, Charging for both a Course Fee and Class Fee—there is an override button in class fee setup.
- D) Administrative Fee setup on Adjustment calendar. 100% withdrawal or cancelation, but want to charge a process fee, can charge a flat fee or %
- E) Specifying a Bad-Debt account on the item type—within item type, general ledger tab, link "write off" put account fund and dept of where you want it to go (instead of fund 10000)
- F) No-Refund Service Indicator on Withdrawals. Coming in 9.0
- G) XML Publisher in 9.0 for reporting purposes—takes query output and formats into a report.
- H) Collections Processing in 9.0—coming after the June go-live date.
- I) New posting option in 9.0 by billing date (vs Assessment or Satisfaction)—coming soon, it wont post to GL until billed but will post to student's account.
- J) Students will be able to provide FA permissions to other years in 9.0 Self Service.

Next meeting would be April 16 and we will be in Bismarck for 9.0 testing. It was decided we can meet as a group in Bismarck if needed.

Next meeting May 21.