

SF User Group Minutes

May 20, 2009

Recorded by VCSU

Attending: BSC, DSU, LRSC, MASU, MISU, MISUB, NDSCS, NDSU, UND, VCSU, WSC HECN-Angela, Marie, & Dee

Scheduling of Processes: Angela reported the problem of schools kicking off the billing process at the same time. This could be setup the same as the payroll process. The generate invoice process will be blocked when another school is currently processing the same job. All schools agreed to have her make this change in production.

Address usage: Chelsea asked what address usage type is everyone using. UND Student Admin keep the home address updated, as do a number of the other schools. There is a problem with Hobson's since they don't update the home address. Note from Mary Bergstrom dated April 17 stated Hobson's update mailing, perm, & parent. Karin will check further with Rhonda regarding this. One school is requesting that their address usage code used for check and advice print be changed. Marie will need to modify the SQR programs and would like to know if any other schools would want their code modified at this same time. Dee will send out the address usage code each school is using. Marie will hold off on the change until all schools can look at this more.

Payment Plan Progress Update: Angela reported they are still reviewing charge priorities, item type setup, and the payment swapping issues. Chelsea is concerned that the anticipated aid wasn't calculating the way it was suppose to. The login flow needs clarification. It's working differently than each thought. Credit offset is not working the way we thought. Angela will be helping Chelsea with testing.

TouchNet Compatibility: Dee reported that test will be down May 12 between 11 am & 1 pm to fix refund and echeck issue; and Friday May 29 for the fix of Bill Payment Suite to be compatible with IE8. This will move into production in June at which time there will be down time. It was decided that the best time to schedule a one to two hour downtime would be early morning. Gar will put a message on the portal and we will be notified. Dee will take all schools scheduled "due dates" into consideration. Janet reported problem with TN not loading. Dee reported that a case is open with Touchnet regarding the service indicator preventing CC payments from being made.

1098-T Correction Transmittal: Please notify Mare of any new originals. She'd like to transmit on May 29, 2009. She'll send an email out regarding this.

SSN Masking: Marie will check with Barb Rask.

DDP Self-Service: This is now active in HRMS and information can be modified. Can this same function be put into student self service. Gar thought it could. Do we want to pursue? Some thought we should look into it. UND asked if it could be turned on/off per institution. Tammy (BSC) will write up request for this.

Mare informed us that a new developer has been hired. He will be working on portal self service. Half time with Marie & other half with Gar.

CC User Group Items: LaDonna will continue on the group. Membership balance needs to be maintained equally amongst all schools. Chelsea has been sitting in on the meetings, also. Non-Student Access-Gar has moved into stage and Angela will be testing. Guest Access-will not be moving forward at this time, it's being further evaluated by Mick Pytlik. The complexity group will be reviewing the issues surrounding bio-demo data such as deceased, foreign student, & development of a name change form. Can the "Student Center" be the default page when students login to their accounts on Peoplesoft? Janet will bring this question up at their next meeting.

Marie is working on the Student Center Account Summary DR. In 9.0 admin can view this only. Student access would of allowed them to see others info, too. Kim, Chelsea, Angela, Tammy will work with Marie on this.

Refund DR's were discussed per attachments sent. Refund Enrollment Report, Refund Outstanding Balance Report, and Refund Pay Calendar Update Process were all approved. Kim will submit DR's on a ticket to begin moving them forward. The Refund Yearly Pay Calendar Update Process was tabled for now.

STAGE will be refreshed on May 26. Dee will be setting up security for service indicator testing to take place after it is refreshed.

Kelly brought up the address that appears on TN ebills to students (help.desk@nodak.edu). Do we want to try and have this changed? One would like to have it more identifiable for students, as it's believed they are deleting without looking at the email. Dee will check with the help desk and the data center. Angela mentioned it would also have to be setup within the bill payment suite.

Aimee asked about DR to modify the font size on billing statements. Some schools still show the credit card request information on statements. There was a question of whether this is meeting PCI compliance. We will revisit.