

University of Idaho

Banner Cross-Functional Team

Thursday, July 9, 2009

8:30 am, SUB Cataldo Room

Present: Chris Menter, Leo Stephens, Melissa Goodwin, Debbie Kolstad, Sharon Jemes, Dan Davenport, Nancy Krogh, Jason Mayer, Kaleb Houck, Karl Riley

MINUTES

- 1. VandalWeb Address Updates.** Debbie asked for group input on what address she should use to send fall billing statements to since all new students get a paper billing in addition to an email bill; continuing students get only an email bill. It was determined that there is no perfect solution to this and Debbie will select the permanent (PR) address as the bill address, unless there isn't one and then default to the mailing (MA) address. It was suggested that the VandalWeb process to remind students to update their address be turned on about 1 week prior to the start of Fall semester and during finals week of Spring prior to the students viewing their grades.
- 2. New Billing Address Type.** Debbie floated the idea of a new address type just for student billing. The idea was not received well due to the number of address types that already exist, having students understand what this type is for, initial population, and maintenance of the data.
- 3. Audit Classes Graded.** Chris updated everyone that audited classes will now be posted on the transcript with a grade of AU. There has been no change to the credit values and no credit is earned for audited classes.
- 4. Banner Upgrades.** Sharon and Karl shared that there are student and financial aid 8.2 upgrades looming. The financial upgrade has a dependency on student and accounts receivable to upgrade so it will be required. The upgrades will be applied to PPRD on Monday, July 13 with the intention of moving to PROD on August 7 or waiting until September 11 which will be the absolute fall-back deadline. General is also upgrading to 8.2. The date will be further discussed at FSS for a final determination. Alumni also has some upgrades and it would be best for all modules to proceed at the same time.
- 5. Student Imaging.** Chris shared that IKON has been hired to image all of the student files and they will begin on Monday, July 13. The project is expected to be completed approximately by the end of the year. All of the images will then be available through Stellent.

- 6. Phone Number Updates.** Jason and Kaleb proposed that they pull forward the last phone number associated with an address when they are inactivating it and adding a new one if there is not a new phone number provided. Since phone numbers have become portable it is assumed that many people keep their same phone number as they move around. Advancement will use the phone number for calling contacts and update them if they find the number disconnected or changed ownership. As part of the larger address discussion, they also shared that Advancement updates addresses from ACS data that they now receive and that they have a created form that allows them to compare and verify address data instead of retyping data into Banner. They will also be pursuing switching to NCOA from ACS after updating the necessary structure.
- 7. Clean Address Update.** In Greg's absence Jason shared what he knew about this product which was purchased and installed, but never fully implemented campus-wide due to a lack of consensus on processed and procedures from all modules. The contract on this product expires in December and Bob Garcia, Director of Advancement is beginning to investigate either renewing the contract or finding a new solution. Dan suggested that this information be brought before MSDG for module discussion so that it does not become a "poster-child bad project" again. Debbie suggested that it would be helpful to arrange a yearly training session for all users on address information and updates due to various requirements such as the Red Flag Rules (identity theft management).
- 8. Deceased Student Process.** Dan relayed a situation with an incoming student who is deceased and how the information is handled. The current deceased process varies depending upon the affiliation of the individual with the University in order to allow all modules to appropriately update their records. Nancy suggest that further investigation be done to find out if there have been any Banner enhancements to their deceased processes beyond the one indicator (which will lock records to not allow updates).

Next scheduled meeting: August 13, 2009