

University of Idaho

Banner Cross-Functional Team

Thursday, September 10, 2009

8:30 am, SUB Cataldo Room

Present: Chris Menter, Tammy Renfrow, Heather Chermak, Greg Cox, Melissa Goodwin, Dan Davenport, Judy Tackett, Jason Mayer, Sharon Jemes, Nancy Krogh, Rod Dunn, Tom Vales

MINUTES

- 1. Imaging and Colored Paper.** Chris asked that all areas be mindful of using (dark) colored paper for forms as they are more difficult to image and read as we go to all imaged student files.
- 2. Workflow for Withdrawals and Deceased.** Heather reported that she was working with an ad-hoc group regarding the semester withdrawal workflow and they will be reconvening to adjust the workflow to fit our business processes. She will also be contacting each module into looking into using a workflow for the deceased processing so they can discuss the needs and requirements of all areas.
- 3. SWANOSH Notifications to Colleges.** Nancy had a question from Lloyd regarding how colleges were notified of reverse noshow students. Melissa indicated the student would appear in the admissions weekly and cumulative flat file again that is sent to the colleges. However, Greg noted that they would not be in the NSS flat files. Admissions also encourages the student to contact the college and/or advisor again. Sharon said that the auto-generated email regarding reverse noshows is only going to the core offices, not the colleges and it was noted that the new CRM may assist with more notifications. Greg will check with Lloyd to see if there is further clarification needed.
- 4. Student Campus Codes.** Dan asked how student campus codes are updated, namely for Idaho Falls students due to the agreement in place indicating that Idaho Falls students will obtain their financial aid from ISU and they use the student campus code to stop processing aid at UI. Chris indicated that all registrations being uploaded from ISU must have a student campus of F to work properly so both she and Alice Allen work from error reports to make the appropriate corrections. Student Accounts also works from the campus code F to not bill students for fees since they also pay ISU. Nancy noted that the agreement is under review since ISU is converting to Banner and registration processes will be adjusted. If there are any students in questions, Chris offered to research them more.
- 5. Drop for Non-Payment.** No update on this topic.

6. Placeholder Registrations. Chris updated everyone that in early August Student Accounts, who is manually adjusting fees, insurance, etc. on study abroad registrations, asked if billing hours could be adjusted on these placeholder registrations. Upon review in the Registrar's Office it was found that the 999 placeholder classes were not consistently coded—some had billing hours and some did not—so they were all adjusted to not have billing hours but this caused problems with financial aid disbursement. Rod indicated that bill hours is the required field for disbursement to work, however they have adjusted for consortium (CNSR) which does not have billing hours in order for disbursement to work. Since Debbie was not at this meeting to represent A/R, it is not know if any adjustments can be made to their billing area so that manual adjustments do not have to be done. It was decided that a small group get together to discuss what may or may not work to alleviate any extra manual data entry for everyone and until then no adjustments will be made to the classes; Heather will coordinate. The placeholder classes are:

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| CATI 999 | Bill Hrs = 0 |
| CNSR 999 | Bill Hrs = 0 |
| COOP 999 | Bill Hrs = 0 |
| ISEP 999 | Bill Hrs = 0 |
| ISU 999 | Bill Hrs = 0 (& credit hrs = 0) |
| LAW 999 | Bill Hrs = match credit hrs |
| NSE1 999 | Bill Hrs = 0 (pay host fees) |
| NSE2 999 | Bill Hrs=credits (pay UI fees) |
| SA 999 | Bill Hrs = match credit hrs |

Next meeting: October 8, 2009