Merit Aid Advisory Group Minutes

February 4, 2010

Present: Alene Smith, Diana Woodworth, Doug Levy, Doug Fletcher, Doug Keasel, Elaine Nowak, George Dendrinos, Joy Millina, Julie Cole, Matthew Martin, Mary Gaynor, Michael Leier, Michelle Spornhauer, Paula Trail, Xiao-Wen Zou

Absent: Brian Jones, Carmen Colby, Daryl McDaniel, Eileen Brussolo, Emily Moorefield, James Roane, Janet Lineer, Katherine Gottschalk, Pat Marts, Regina Zmich, Vicky A. Dziubinski

Guests: James Middlemas, Bonnie Woods, Margaret Rodriguez

1. Update 2011 Awarding Calendar-Margaret

- For aid year 2010 total request for aid was up by 20%
- Pell recipients for 2010 increased by 25%
- Currently no indication that Spring/Summer request for aid will increase
- Grant and Work Study will be available for Spring/Summer but no Perkins
- First time Pell will be offered for Spring/Summer

Entering Student Processing for 2011

- Currently plan to send out first award notices on March 5th.
- To make sure departmental awards are on the award notice they should be coded by March 3rd.
- Current budgets will be used for entering students and the budgets are estimated to be run the week of February 8th.
- After the budgets are ran can use the calculation option to code for tuition and fees.
- There will not be an increase in the personal and miscellaneous or books component of the budget.
- State funds will not be offered as part of the aid package. Eligible students will be offered institutional funds.
- Merit and Diversity offers have been going out since December and will continue to be offered through February and March.
- Currently anticipate Perkins to be offered to both Undergraduates and Graduates. Will probably be $500.00 for the aid year. Some changes in Perkins for 2012 more to come later.
- Private Loan volume down. These loans are hard to qualify for.
- Federal Plus loans volume increased for both parents and the Federal Graduate Plus loan program.
2. Repayment of stipends non-resident aliens-Alene

- Non-resident aliens are taxed 14%. Students should check Payroll’s website to see if there is a tax agreement between their Government and the US Government. If so fill out the form and send this to Payroll and taxes will not be withheld.
- If a student has to re-pay any funds that taxes were withheld and it is in the same calendar year as the payment the net refund should be re-paid.
- If the re-payment happens in the next calendar year then the student needs to pay back the gross refund. Early January is when W-2’s are printed and this prevents Payroll from pulling the tax amount back. The student will need to file a 1040 to get the refund for the taxes.
- Students can check the International Center’s web site for tax information help or they can visit the International Center. The International Center does not help the student fill out their tax returns but has software the students can use to file.
- Students who are required to pay funds back on their customer accounts should:
  
  write the check to the University of Michigan  
  put the EMPLID on the check  
  give the check to the departmental person who will turn the check around (currently Alene Smith) in the Office of Financial Aid.  
  She will make sure the funds have been cancelled  
  Give the check to Student Financial Services to reverse the refund  
  The check is sent to Payroll, funds removed from the student’s earning record

Retro-appointment for GSI or GSRA appointments-currently there is nothing that prevents departments from retro-appointing a student to a GSI or GSRA. As long as the department can justify the appointment it can be done. They are discouraged from this practice due to the negative impact on the student.

3. Update Financial Aid Forecasting and Resource Management (FARM) Project-Elaine

The Foundation stage has been completed. Pilot offices have been trained and are currently using the software.

The pilot offices have identified the top automation requests for Phase II. 1) Push commitments to award entry. 2) Shortcode copy to speed setup, and 3) Commitment copy from student to student(s) to help speed data entry.

ITS is beginning the development effort for summer release.

General release TBD.

4. Entering Scholarship Funds Matching Update-Elaine
Enhancements that will be rolling out in February:

- Significantly improved performance when running the program
- Matching for Admits as well as matriculated students that will allow separate rules for each population.
- New population selection tool-which will automatically loads to the SFM Selection “Select Students by Emplid”

Enhancements rolling out in March/April:

- Student Scholarship Profile which is a Wolverine Access Self Service page. This will enable students to supply additional data not currently collected and/or maintained in the M-Pathways system. This should enable departments to eliminate separate scholarship applications.

5. Miscellaneous-All

Are College Work Study job postings down this year?

- Doug Fletcher indicated he is seeing a number of students who are unable to locate a work study job this year.
- Vickie Crupper indicated that the numbers of postings are down this year but the numbers of jobs are about the same. She indicated that what the Work Study Office was seeing is that when the department fills their jobs they are closing the listing on the system. A couple of tips for students are go down to the middle of the job listings and work up or down. Also call more than one or two employers.
- Vickie has agreed come to our next meeting and talk about ways to help students locate work study positions.

6. Next meetings:
   - May 6, 2010
   - August 5, 2010
   - November 4, 2010