Merit Aid Advisory Group Minutes
February 2, 2006

Present: Alene Smith, Brian Jones, Cathy Jenkins Newton, Diane Hunt, Diana Woodworth, Doug Levy, Elaine Nowak, Ethel Thoms, Heather Wenzel, Janet Lineer, Joey Grzeskowiak, Lynn Alexander, Martie Boron, Marty Snyder, Matt Martin, Michelle Spornhauer, Patrick Bretschneider, Paula Trail, Roger Maki-Schramm, Sandra Rod, Xiao-Wen Zou

Absent: Beth Soboleski, Carmen Colby, Doug Fletcher, James Roane, Katherine Gottschalk, Lisa Jones, Mary Clark, Mary Gaynor, Pat Marts

Guest: Margaret Rodriguez

1. Minutes from December 3, 2005-deferred

2. Spring/Summer 2006 Processing Update-Margaret Rodriguez

Margaret went over the attached document in regards to the Spring/Summer award notification for students:

- Spring/Summer application was available on 1/27/2006; priority application deadline is 3/08/2006 with award notification beginning on 3/27/2006. Currently the Office of Financial Aid is not sure what funding will be available for spring/summer applicants.
- Spring/Summer budgets should be loaded by mid-March. OFA is currently waiting for Housing to give us their Spring/Summer housing costs. This is causing some departments a delay in assigning their Spring/Summer awards. Spring/Summer budgets are typically half the Fall/Winter budgets.
- Students do not need to be registered to fill out a Spring/Summer Request for Funds but they do have to be registered to receive a Spring/Summer Award Notice. Please encourage all your students to apply for Spring/Summer aid by March 8, 2006 to receive priority funding.
- Child Care Subsidy for those who qualify is a separate application. The Child Care Subsidy application is currently available for spring/summer. Students must fill out an application and submit the required documents to be considered for this award.
- Reminder: Change the Award Period from Both to Non Std on the award entry manual screen when you are coding Spring, Spring/Summer or Summer awards. By not changing the Award Period and the student is receiving Need Based Awards for Fall and Winter it will cause an over award in Fall/Winter aid. With the over award their need based aid for Fall/Winter will be reduced. Departments should also code awards in the term the student is to receive the funds. i.e. Student is awarded funds for spring but needs the money in winter term to buy an airplane ticket for spring travel. This award needs to be coded in the spring term.
The department can then request a disbursement override by e-mailing sfsp@umich.edu to allow the student to receive the funds now.

3. Fall/Winter 2006-2007 Update-Margaret Rodriguez

Continued with the attached document for the 2007 application calendar:

11/01/2005 Profile Application Available on CSS website.

- Starting this year with the entering Freshmen class an applicant for need based financial aid must fill out a Profile Application as well as the FAFSA. The profile is a separate form that collects more data about the family. The profile is required by a number of private schools but very few public schools. There is a fee for filing the profile application. If the family qualifies a fee waiver will be offered at the time the Profile Application if being filed and OFA can also authorize a fee waiver. If you receive questions about the Profile Application please route the student or family to OFA.
- The requirement for the Profile Application is being grandfathered in. Current students do not have to fill out this application.

1/01/06 the 2007 FAFSA application was available on the US Department of Education’s FAFSA website to be completed

- Suggested FAFSA filing date for all students is 2/15/2006. This date is closer to the State of Michigan deadlines and should cause less confusion for students on when to file the form.
- The priority application deadline for all students is 4/30/2006 for priority funding. Applications completed after this date will still be considered for any available funding.
- Entering student budgets loaded on 2/15/2006 with the first notification going out on 3/2/2006. This year OFA will not mail out postcards to students indicating their award notice is available for viewing on-line. Last year less then 150 paper award notices were mailed out to families.
- Continuing student award notification begins 5/15/2006 with budgets loaded mid-March.

2007 Delivery System What’s Changed

- College Board Profile Application Required from entering freshmen only.
- Uniqname is being issued at matriculation. The student will receive an e-mail telling them how to acquire a uniqname and this is the e-mail address that communications from the University of Michigan will be mailed. If the new student does not respond to the first e-mail 15 days later a second e-mail will be sent. Still no response to this e-mail after15 days a letter will be mailed to the student.
Renewal application information has been shared with ‘Friends & Family’ this year.
OFA ran a report and only about half of the student population has signed up for the family and friends account option.

2007 Delivery System What Has Stayed the Same

- All applicants must fill the FAFSA to be considered for need-based aid.
- Priority application deadline is April 20, 2006 for all students.
- All applicants will be notified by e-mail.

4. Self Service Transaction Activity-OFA, Student Accounts.

This is information that is displayed on the Customer Account that shows when and who has accessed the account for the student. This access is controlled by operator ID and is not meant to be used as a got you for students. Hope to use it as a training tool to help students and families interpret data on Wolverine Access.

Miscellaneous-All

-1098T is a form that is mailed out each year to students who have received scholarship and grants.
  - Box 1 is not used.
  - Box 2 lists the amount billed for qualified tuition, registration fee and class fees for the calendar year 2005.
  - Box 3 lists any adjustments for the prior calendar year.
  - Box 4 lists any scholarship or grants the student received.
  - Box 5 lists adjustments to scholarships or grants for a prior year.
  - Box 6 if checked indicates that amount in Box 2 includes funds for academic period beginning January – March 2006

Over 40,000 forms were mailed and a large number has been returned to Student Accounts as undeliverable. The forms are only mailed to U.S. Students and are used for those who qualify for Life Long Learning and Hope Scholarship credits on their taxes.

-How are changes to the FA Summary Reports requested? E-mail the maishelpdesk@umich.edu and carbon copy the MAAG group. The request will be logged and if time permits the changes will be made.

-Question asked how the web site for Undergraduate Engineering on-line scholarship decisions is coming. Some problems getting the website as interactive as needed. Hope to have the bugs worked out this summer and up and running for 2008.

6. Next Meeting
   March 2, 2006

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