Merit Aid Advisory Group Minutes
April 6, 2006

Present: Alene Smith, Brian Jones, Diana Woodworth, Doug Fletcher, Elaine Nowak, Heather Wenzel, James Roane, Joey Grzeskowiak, Martie Boron, Marty Snyder, Matt Martin, Mary Gaynor, Michelle Spornhauer, Pat Marts, Patrick Brettschnedier, Regina Zmich, Roger Maki-Schramm, Sandy Rod, Ziao-Wen Zou

Absent: Carmen Colby, Cathy Jenkins, Diane Hunt, Doug Levy, Ethel Thoms, Janet Lineer, Katherine Gottschalk, Lisa Jones, Lynn Alexander, Mary Clark, Paula Trail

Guest: Doug Keasal, School of Rackham

1. Minutes for December 3, 2005 and February 2, 2006 approved with already noted changes.

2. M-Pathways Forum-Elaine

Elaine went over the “M-Pathways Forum” Proposal. This forum proposal came about due to the number of shadow systems being requested of MAIS along with the Deans and Directors concern that the Pathways system is not being used to its fullest potential. There is a feeling that currently too many e-mails are being sent and staff are not reading them.

A general meeting is being proposed with the push being “this is not a training session but an informational meeting”. A number of mini sessions would be offered for attendees to choose from. These sessions would be given by a departmental staff member that uses the functionally to allow them share ideas on how their department uses the functionality. This staff person would not be training but sharing ideas of how they manage their work load and/or shortcuts they have found to make the job easier. This may also expose some staff to new or underutilized functionality in the Pathways system.

Questions of the MAAG Group:

- Do you think staff will want to attend? Yes
- Will staff have time to attend? Depends on the time of the year, avoid the peak times for departments.
- How can key administrators, strategic planners be encouraged to attend? It will be hard to get deans and directors to come. Target the e-mail toward the lower managers to encourage them to send their staff. Concern that if the communications go to higher level administrators the information may not get filtered down.
- Would a whole day or half day be better? Once or twice per year? Half day twice a year.
- Topic suggestions? Any ideas send to the entire MAAG e-mail group.
Elaine will take these comments back to MAIS with more to come later.

3. Award Load Project-Elaine

Elaine went over the “Award Load Project Proposal” that gave the scope and process of the ability to upload awards into the Pathways system. The ability to file attach was in the People Tools release about a year ago.

See the attached proposal for the process overview. This award load project is only for new awards that are introduced into the system. After the awards are entered into the data base any changes will have to be done via the award entry manual screen.

MAIS goal is July for this project.

4. Enhancement Student FA Package Status-Elaine

A request was made to have the telephone number, the credit hours toward degree, status of Spring/Summer package and the ability to have the report split after each term so that all term information is on the same page.

The group agreed that it would be nice to have the telephone number, credit hours toward degree and status of Spring/Summer packaging added to the report. The term split information could cause a large number of pages to print. Group agreed the term split was not really a problem and they can live with it.

The changes on this report will be used as a filler project; currently MAIS does not have the resources to work on these changes.

5. Repayment of cancelled stipends-Alene, Heather

When a student has their stipend cancelled the repayment of funds and the removal of funds from their yearly taxable earnings has caused a number of problems.

A number of departments are not aware that when the award is cancelled on Pathways the funds go back into their project/grant and the University becomes the collector of the debit. A few departments have taken the check from the student and deposited it into their account which leaves the amount still owing on the students customer account. Student Accounts then has to request a JE to move the funds from the departments account into their account to allow the customer account to show payment.

If the student pays cancelled stipend amounts back on their customer account Payroll is unaware of this and the funds are not removed from the W2’s. The W2’s the student receives is not accurate and the student is responsible for paying taxes on funds they did not receive.
MAAG members suggested that Heather and I write procedures on how to have these funds paid back. MAIS will then run a list of all staff that enter REFONLY awards and will send these procedures to them.

6. Spring/Summer coding in Fall/Winter-Alene

A number of departments have students who need their Spring, Spring/Summer or Summer awards prior to these terms disbursement dates. To allow the students to receive these funds early the departments are coding the awards in Fall/Winter which is throwing the student into an over award for Fall/Winter. The students need based awards are being cut back with the student then owing funds back. The student then receives a statement indicating they owe xx dollars back to the University and are very upset. Depending on when the student is notified of this change the funds may or may not be able to be given back to the student.

The award needs to be coded in the term that the student is to receive the funds. The department staff then e-mails Financial Aid requesting a disbursement override to allow these funds to be released prior to the beginning of the term.

MAAG suggested that a reminder e-mail goes out prior to the beginning of coding for Spring/Summer to remind staff of how these awards should be coded.

7. Miscellaneous-All

- Communication between OFA and Departments-Sandy
  A concern that departments are not aware of aid that is available to students prior to award notifications being sent. A number of suggestions were given and OFA is looking at the best ways to give information to departments.

- Status of 05/06 and preparations for 06/07
  The attached spreadsheet indicates the FASF Product Strategy Projects that have been completed or still in progress for 05/06.

When the list for 06/07 has been defined Elaine will share this information with the group.

Next meeting
  June 1, 2006