

BG@100 Project Fit-Gap Agenda & Session Notes

Date: September 5, 2007
Time: 1:00 PM to 4:00 PM
Location: 301 Education Bldg.
Session #: FAFG001



Session Leader: Robbie de Leur

Functional Lead: Tina Coulter

Note taker: : Jerry Ameling

Session Name: Creating a New File Year

Session Description: This session (1) explores the calendar for financial aid processing, (2) the sources and procedures associated with applications for financial aid, (3) tracking applications and communication with applicants, and (4) reports used for auditing (error identification), management (summary information), and processing (work lists).

Invited Attendees: Invitees/Attendees (* in attendance, # absent, - late, + substitute, = by conference call, ^ training)

**Potential Guests to one or all f/g sessions.

Meeting Maker

Invites:

Required

Optional

CC'd

Robbie de Leur	Greg Guzman	Deb Divers	Tawn Williams-Nell
Tina Coulter	Laura Emch	Cheryl Chafee	Cindy Koontz
Jerry Ameling	Suzanne Fahrer	Julie Freitas	Lynn Huber
Tammy Ludwig	Dawn Vollmar		Denise Grigson
Lori Beeman	Jackie Tracy	Gary Swegan	Sheila Rahe
Phyllis Short	Robin Belleville	Cecilia Castellano	Cindy Cook
Kristen Baldelli	John Eggenton	Chris Cox	April Shumaker
Nancy Colzman	Tony Laurene	Camille Consolvo	Lisa Nash
Deb Clink	Connie Weaver	Terry Lawrence	Cheryl Reynolds
Kristen Williams	Leslie Lipper	Gail McRoberts	Vicki Sulken
David Ehrlich	Cindy Schmitz	Stan Lewis	
Carol Hague	Kristin Tuttle	Judy Donald	Jen Milligan
Eric Zahnle	Ed Recker	Joy Hartwell-Lein	Ilse Thomas
Rich Kasch	Laura Gazarek	Michelle Simmons	Larry Smith
Steve Hamrock	Jerrie Hutton	Michele Schmitz	Sandy White
Sue Lau	Karen Donaldson	Becky Pissanos	
Laura Waggoner	Suzanne Barrett	Nicole Anderson	John Cuckler
Sue Tomor	Char Schwerkolt	Sid Sink	Judy Hagemann
Carol Christman	Pam Fletcher		Linda Hamilton
Jason Gross	Gail Houtz	Donna Wittwer	
Jie Sue	Lynette Rosebrook	Beth Ann Rife	
Mike Failor	Kiley Blackburn		
Art Herbert	Linda Snyder		Robert Zhang
Meredith Flynn	Bill Gerwin	Meg Shiple	Conrad McRoberts
George Amalor	Cindy Fuller	Joyce Brady	Al Gonzales
Kevin Washington	David Hayes	John Konecny	Mel Hudson-Nowak
Bruce Petryshak	Linda Dobb	Gaylyn Finn	Mark Gromko
Shirley Baugher	Ron Lancaster	Sherideen Stoll	Ed Whipple

Agenda Topic: New File Year

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1. Our approach to Fit-Gap
 - a. Explore existing processes
 - b. Identify significance (Process, Outcome, Data)
2. Office Calendar/Awarding Cycle
 - a. Reg's releases
3. Applying for aid
 - a. Sources of aid applicants (for example, AD scholarships, Athletics, PLUS tracks, FAFSA application results)
 - b. Aid Year Activation, Packaging Status Summary, and FA Terms
 - c. ISIR file import/export, ISIR Suspense
4. Tracking and communication
 - a. Requirement lists
 - b. Communications
 - c. Related 3C setup including document tracking and missing information letters
5. Reports
 - a. Audit
 - b. Management
 - c. Processing
 - d. Delivered reports and Query Manager

Additional Information

1. New Aid Year Implements Document
2. ISIR Loading Workflow
3. 2007-2008 Tracking Documents
4. SFA Clearing Default Tracks on SAM

Notes

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Identify Fit(s)

Identify Gap(s)

Issue Log Items

Outstanding Items

Impact on office (Directors only)