

BG@100 Project Fit-Gap Agenda & Session Notes

Date: September 6, 2007
Time: 9:00 AM to 12:00 PM
Location: 114 BA Bldg.
Session #: FAFG002



Session Leader: Robbie de Leur

Functional Lead: Tina Coulter

Note taker: : Jerry Ameling

Session Name: Needs Analysis and Verification Processing

Session Description: This session explores the use of (1) INAS simulations, QA verification, and EFCs; (2) SCAPs, dependency appeals and overrides, and NSLDS; (3) the cost of attendance and student budgets, (4) document tracking and student communication, and (5) and 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	John Cuckler
	Laura Waggoner	Suzanne Barrett	Nicole Anderson	Judy Hagemann
	Sue Tomor	Char Schwerkolt	Sid Sink	Linda Hamilton
	Carol Christman	Pam Fletcher		
	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

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Agenda Topic: Needs Analysis and Verification

1. Our approach to Fit-Gap
 - a. Explore existing processes
 - b. Identify significance (Process, Outcome, Data)
2. Needs Analysis
 - a. INAS Simulation
 - b. QA Verification
 - c. EFC for non-standard (summer) terms
 - d. Simulating INAS, automated verification, EFC Adjustments, standard vs. non-standard terms
3. Eligibility criteria
 - a. (SCAP) Special Considerations Application
 - b. Independent override and dependency status
 - c. NSLDS/IMA/External Interface
 - d. FA Overrides, PJ Adjustments
4. Cost of attendance / Budget
 - a. Components
 - b. Groups
 - c. Assigning
 - d. PJ Adjustments
 - e. Budget items, budget formulas, building budgets
5. Tracking and communication
 - a. Requirement lists
 - b. Communications
 - c. Related 3C setup
6. Reports
 - a. Audit
 - b. Management
 - c. Processing
 - d. Delivered reports and Query Manager

Additional Information

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Notes

1. SFA Verification Workflow
2. SFA Database Matches – SSA Workflow
3. SFA Database Matches 2 – DHS, SS, VA Workflow
4. SFA Database Matches 3 – NSLDS Workflow
5. SFA Citizenship Workflow
6. SFA IMA Workflow
7. SFA Discrepant Info – Subsequent ISIR Workflow
8. SFA Discrepant Info – Unsolicited Taxes Workflow
9. SFA I99 – Birth Dates Workflow
10. SFA Ward of the Court Workflow
11. SFA Independent Override (Initial) Workflow
12. SFA Independent Override (Renewal) Workflow
13. SFA Special Considerations Application (SCAP) Workflow
14. Cost of Attendance Document

Identify Fit(s)

Identify Gap(s)

Issue Log Items

Outstanding Items

Impact on office (Directors only)

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