

Installment Plan Meeting Minutes

July 22, 2013

Attendees: Chien Shih, Joe Lampo, Bret Watson, Tom Roza, Scottie McDaniel, Henry Jung, Bret Watson, Kathleen Moberg, Henry Nguyen, Sherri Mines, Bill Baldwin and Kari Elliott (note taker).

On Conference Call: Matt Fine (TouchNet), Natalie Bankus (TouchNet) and Nina Van.

1. Team Recommendations – waiting for Steering Committee approval.
 - Installment fee decision; team recommends \$25 per quarter.
 - Recommend not rolling balance for installment plan to next quarter.
 - Charge \$50 installment fee for 3 quarters; incentive for students to stay more than 1 quarter.
 - Do not charge students late fees or interest.
 - Meeting scheduled July 23, 2013.
2. User Testing – ready to begin.
 - Link for training has been emailed.
 - Have test case scenarios.
3. August 14, 2013 Objective.
 - Be able to make a payment by credit card, ACH or payment plan.
4. Marketing Departments at both colleges working on announcement to students.
5. Customized Pay Now Button needs to be included in credit card, ACH and payment plan options.
 - More discussion needed.
6. Status Report.
 - Test ACH file to district bank – July 24, 2013.
 - Need to generate test transactions.
 - Need routing number for test ACH; makeup account number.
 - Need to finalize payment plans – Steering Committee meeting scheduled.
 - Need international students IDs for testing – Joe Lampo will provide.
 - Continue user acceptance testing.
 - Once milestones are completed, can begin configurations in production.
 - Email questions to functional leads, Bret Watson (De Anza) and Henry Jung (Foothill).
 - Any questions emailed to Natalie Bankus should copy Matt Fine.
 - LDAP authentication – August 9, 2013.
 - TouchNet will install LDAP Connect on their end this week.
 - Link Student Account Center for installment plan.
 - Confirm single sign on is working.
 - Implement installment plan first; implement drop policy later.
7. Milestones.
 - August 9, 2013 – LDAP authentication.
 - August 14, 2013 – user testing and sign off.