

# Installment Plan Meeting Minutes

July 15, 2013

**Attendees:** Chien Shih, Joe Lampo, Rachel Tai, Bret Watson, Susan Malmgren, Tom Roza, Scottie McDaniel, Henry Jung, Nina Van, Bret Watson and Kari Elliott (note taker).

**On Conference Call:** Matt Fine (TouchNet) and Kevin Harral.

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.
  - Matt Fine will email training link this week.
  - Contact Joe Lampo if an account is needed for testing.
  - Need test case scenarios.
    - De Anza students see De Anza payment plan
    - Foothill student see Foothill payment plan.
    - Concurrent students – see primary campus payment plan.
    - F1 students.
  - Email Matt Fine and Natalie Bankus with any questions/issues; cc Kari Elliott to document.
3. August 14, 2013 Objective.
  - Be able to make a payment by credit card, ACH or payment plan.
4. Marketing Departments at both colleges need statement to communicate to students.
  - When payment plan begins, fees associated with payment plan.
  - Foothill has drafted a statement; bring to next meeting for review before sending out to students.
  - Need to review drop policy and communicate any changes clearly to students.
5. Customized Pay Now Button needs to be included in credit card, ACH and payment plan options.
  - More discussion needed.
6. Milestones.
  - July 18, 2013 – user testing begins.
  - August 14, 2013 – user testing and sign off.

## Take Away Items:

1. Draft milestones for testing.
2. Rachel Tai will provide category of students to test; Foothill will use same category for testing
3. Matt Fine will provide requirements for LDAP and a contact from another school using LDAP by July 12, 2013.