

Installment Plan Meeting Minutes

July 1, 2013

Attendees: Chien Shih, Nazy Gayolan, Joe Lampo, Rachel Tai, Bret Watson, Susan Malmgren, Sherri Mines, Bill Baldwin, Nina Van, Kathleen Moberg, Catherine Sun, Tom Roza, Kevin Harral, Martin Varela, Scottie McDaniel and Kari Elliott (note taker).

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

1. Team Recommendations.
 - 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.
2. Training schedule – week of July 11, 2013.
 - 3 days, 2 hours a day.
 - Remote WebEx session; on calendar.
3. Business Data Gathering Worksheet. – complete June 28, 2013, still incomplete.
 - Need to complete Bill Payment Suite tab by July 2, 2013 for training next week.
 - Also need test student accounts by July 2, 2013 for training next week.
 - Rest of data gathering worksheet can be turned in later.
 - Need to create new detail codes (cashiers offices at colleges).
 - Online payment plan.
 - \$25 installment plan charge fee.
 - ACH charge.
4. Technical Update.
 - Storage procedures complete.
 - DAD application has been installed.
 - Banner connect installed at TouchNet site; connectivity test worked.
 - Updating firewall; complete end of day July 1, 2013.
 - Working on single sign on.
5. Milestones.
 - July 5, 2013 – Test instance ready.
 - July 18, 2013 – user testing.
 - August 14, 2013 – user testing and sign off.

Take Away Items:

1. Complete data gathering guide.
2. Create new detail codes.