

Installment Plan Meeting Minutes

June 24, 2013

Attendees: Chien Shih, Nazy Gayolan, Joe Lampo, Rachel Tai, Bret Watson, Susan Malmgren, Sherri Mines, Matt Rapczynski, Bill Baldwin, Nina Van, Inna Witkop, Kathleen Moberg and Kari Elliott (note taker).

On Conference Call: Matt Fine (TouchNet), Jennifer (TouchNet), Judy (TouchNet) and Tom Roza.

1. Technical Update.
 - Install Banner Connect on TouchNet side.
 - Determine authentication – Tom Roza’s team working with TouchNet.
 - Complete technical setup July 5, 2013.
2. Process Payments through Bill Payment Suite.
 - 2 colleges – primary campus identifies which campus to post online payment to.
 - Different terms per campus.
 - Use campus codes – need to provide to TouchNet.
 - Need test students for each campus.
 - Payment plans for each college.
 - Use detail codes for charges at each campus.
3. Training schedule – week of July 11, 2013.
 - 3 days, 2 hours a day.
 - Remote WebEx session; schedule this week and put on calendar.
4. Business Data Gathering Worksheet. – complete June 28, 2013.
 - Installment plans posted as memos on student account in Banner.
 - Can build into add/drop logic.
 - Fees – International vs. domestic students.
 - Steering Committee decision; not made yet.
 - Team members recommend \$25 installment fee.
5. Financial Aid Students.
 - Students pending financial aid will need to sign up for installment plan; when approved and receive disbursement, treat as payment to installment plan.
 - BOG waiver fee pending (usually takes 24 hours to go through); waive \$25 fee for late BOG
6. Milestones.
 - July 5, 2013 – Test instance ready.
 - July 18, 2013 – user testing.
 - August 14, 2013 – user testing and sign off.

Steering Committee Issues:

1. Installment fee decision; team recommends \$25 per quarter.
2. Recommend not rolling balance for installment plant to next quarter.
3. Charge \$50 installment fee for 3 quarters; incentive for students to stay more than 1 quarter.
4. Do not charge students late fees or interest.

Take Away Items:

1. DAD Banner connect ready.
2. Data review guide completed by June 28, 2013.
3. Schedule 3 training days, 2 hours each day and put on calendar.