

June 7, 2017

Introductions

Welcome to Michelle Curtis (replacing Dianne Danov) and LuGail Hamel (replacing Kari Ellering)!! Michelle has been at the University for 9 weeks and LuGail for 10 days.

Financial Aid Updates – Michelle/Dianne

- STAR group meeting – report any items to Michelle that you would like to see change or improve (discussion took place at the end of the meeting as well).
- Scholarship financial aid update as of June 1:
 - 10,582 scholarships entered into the system, over \$50 million awarded to students for 2017-18
 - Summer, first disbursement happened Monday June 5th – deadline to submit scholarships for Summer is August 17th
 - June 30th deadline for the Fall/Spring scholarships in order to be included for continuing students initial financial aid award letters.
- Board of Regents meeting later this week, waiting to see how they set tuition before we can package official award letters. Many fees will stay the same, voting on the tuition should happen later this month. Tuition is projected to be at a 3% increase, non-residents 10%. Once all of the tuition numbers are set, the estimated financial aid awards for First year students will be cancelled and re-awarded as official awards.
- We are in the second year of prior-prior-year (PPY) tax information. The IRS Data Retrieval Tool (DRT) is still not available for the 2017-18 FAFSA, can cause some disruption for students. For 2018-19 year (Fall 2018, Spring 2019), the DRT process should be back online.

4999 Updates – Kari

- The process of registering a student in a 4999 course has been updated to have the student register in the course with a permission number. The process was adjusted in order to make the awarding of scholarships more timely and efficient.
- Here are some examples of the improvement:
 - Last year – 280 error files at this time, this year we have 107
 - Last year – 134 award disbursements requested at this time, this year 406 awards have already been requested
- This marks great progress in getting the awards to the student accounts in a timely manner.

Foundation update – Marcy Joseph, Sr. Stewardship Specialist with the Foundation

- Report on endowments: Annual financial report the Foundation provides to the donors (about 2400 households). – provides information on who has received their scholarships. The report comprises about 1900 scholarship funds.
- Reports are mailed to the donor, very personalized/specific to donor.
- Student name, hometown, and college they are enrolled in are provided to the donor.
- Criteria for those donors that receive the report: endowed and quasi-endowed funds with the donor giving a \$25,000+ gift
- Thank you for inputting the information into the system!

- The data will be pulled after Fall census (Sept 19th)

Scholarship/STAR discussion: Michelle asked for some input on things the administrators would like updated within STAR or the scholarship world in general.

- Michelle Wills, CSOM – Study Abroad scholarship awarded early in education, can use anytime in their 4 years. Would like a way to track projected funds that may be used in upcoming years.
- Mary Ellen Shaw, CEHD – STAR Reports could use some tweaking in usability/simplicity. DMS student recipient lists do not have student IDs listed, whereas STAR has it.
- Jenny Malek, Admissions – Renewable scholarships, have an option to delete a student forever from future lists as well as just for that year. She runs into situations where they will not pay a student the scholarship again and would like to be able to remove them from all future lists.
- Download/Upload EFS information seems to be working well. Some issues with multiple item types on different funds (Curtis Coffey, NURS).
- Mark Bultmann, OUE – Continue to work on the Online Scholarship Application usability. Help improve the process of reviewing the application questions/selector data.
- Barb Schwab, CLA – multi-year projections with 4 year commitments, sandbox (what-if) projections. Most of the college representatives agreed this would be a top priority.
- Holly Klinger, CFANS – would like to be able to review other financial information for a student as they could in the past. It had come up as an audit issue, so that access may not come back. Questions come from OneStop around scholarships and which department to reach out to with questions. If you have an award message in the system, the student can see that – can include information on which college/department awarded the scholarship. The Scholarship Unit can put together training in next meeting on how to update the award message information.
- Michelle Wills, CSOM – It would be nice to be able to see attributes of the item types: disbursement level requirements, award messages, etc. Possible idea to have a query built to see the item type attributes. Dianne is also working on a project to clean up item types.
- Student is a senior and less than full-time scholarship disbursement options. At this point it is up for discussion for next year – the one-term exceptions. The University is looking at impact and volume.

Updates:

OSF Scholarship Unit hopes to have the item type attributes process available this fall, it may consist of the dept contacting OSF and we run a query for you.

The award messages is also doable - given the number of scholarships eligible we may have to target larger ones to start with.

Regarding the forwarded calls from One Stop - Michelle has brought this to the attention of Nate Peterson, associate director who will remind their staff of the need to be thorough before transferring calls to the depts. What would be helpful is if you are noticing a trend or have a specific student example - please let Michelle or Nate Peterson in One STOP know so we can address in a timely manner.