

## BST Agenda NOTES

Date: 03/29/01, 1:30 pm-3:00 pm

Note-taker: UA (Saichi)

Participants: Kim, Patty, Shelly, Paul, Mary, AnnT, Colleen, Julie, JJ, Brig, Cheryl, Charese, Carolyn, Saichi

### Date Campus

03/29/01	UA
04/26/01	UAS
05/10/01	UAA
05/24/01	UAF

Any additions to the agenda? *Colleen's Task Requests and NO meeting on 4-12 (people returning from Summit) JJ mentioned she was holding a "reg class at SW" for programmers who are not going to Summit. JJ asked if web should be turned on when she is at Summit, everyone agreed it should be.*

- 1) Reports: *Work teams: Ann provided an update since the Web Reg team had met recently (twice), JJ has made the changes requested, everyone believes "we are almost there" with regard to rolling web reg out to students. UAA is planning on testing on 4-17. The alternate pin is needed for testers to utilize web reg. UAF and UAS plan to use student workers in their test pilot as well as other selected populations. UAA is dedicating a lab to testing with written instructions and an evaluation of the process—which people have asked UAA to share the results.*
- 2) Requests: *Kim (UAS) asked for additional address source codes—EZ AP and EVER—they were agreed to by UAA and UAF.*
- 3) Known system down time (Published Document): *4-1-01-NO Glacier or Nugget; 5-19-01 Day reserved for upgrades; JJ reported that the BCT is looking for dates to apply the Oracle upgrade—sometime in October 2001...*
- 4) JJ: *Upgrades to Banner are in the house—testing will happen 4/27/01. Tonight (3/29) CAPP paper fix is moving to production. The TRNX to TRN4 data moved has been delayed (EDITORS note: the move has been completed—issues surround the data continue though, Karen, Cheryl and Kim are working with Jim Chapman to resolve). SHAETAQ fix is in the works!*
- 5) Other items as time permits:

**Inactive Addresses:** This topic will to be discussed at a future BST meeting that should include representation from other user areas, i.e. HR, Finance, FA, etc.... UAA met with their HR, Finance, Enr Svcs and FA offices and they are suggesting the use and creation of an 'LK – Last Known' address type that could be used as an 'active' address if all others are determined to be inaccurate or bad addresses. This new address type would allow for the continuation of best business practices at UAA while providing a mechanism that would allow the printing of yearly tax forms that cannot print w/out some type of 'active' address type. UAA is also suggesting that to encourage students to give us their active address, that we create a special 'Bad Address' hold. This hold would be placed on the student and certain activities would not be allowed without getting a current address, such as registration or viewing/printing off grades and unofficial transcripts. The hold suggestion needs to be discussed further with the other MAU's. There was also a suggestion that the zip code for these 'LK' addresses is 000 or 00000 so working lists and mailings can easily be identified as either being worked on and/or not to be mailed out. There was discussion that maybe we need to create some type of incentive to get our students to provide their active address rather than not allowing a student to register. No definite solution was determined at this meeting, but Karen W asked JJ to show UAA's suggestion to Rayanne

of statewide Finance to get her comments. OIR also wants to discuss the OE addresses; apparently there are some problems.

The remainder of the meeting was devoted to the 1098 process and the issue of bad addresses in Banner.

Following the suggestion of UAA to use zeros in the zip code, the question was asked how do you remove the "000's" before printing?

An excel sort process was suggested.

(JJ) The process that generates the 1098's is electronic—you might not be able to separate the forms.

(PI) Printing them by address type was suggested (find the LK's and then NOT print them)—in an effort to control what forms are actually mailed.

(JJ) User services plans to run a report to look for the bad addresses a couple of times a year—proactively searching for the problem instead of waiting for the tax forms job to be run—and then trying to remedy the problem.

(PI) Is the issue to remedy the bad address? UAA plans to make returned mail addresses "LK's" on the system.

(CB) The onus should be on the campus to receive from the student a viable address. Perhaps using an electronic process to capture this information.

Suggestion was to utilize the Web reg process and 'require' they update their address...UAS ODES require they update 'something' to activate the time stamp.

The question was raised: what must the University do to satisfy the IRS regulation?

Suggestion: can we manipulate the zip code field with a period or space to aid in sorting the bad addresses from the good?

Response: may not be enough room in the zip + four structure of the field.

Flagging the BAD addresses (i.e. using LK) to prevent mailing information to those bad address or somehow inactivate PR

Using a period or space in the zip code.

Julie—from IR: using an extra character will jam up zip to city matches.

(PI) Can we use the third address line?

(CP) No we would not be able to sort.

Question: who incurs the postage cost? Answer: business offices at the MAU's.

How many 1098's had bad addresses?

UAF—40

UAA—400

UAS—3

(CA) Can we run the TRS report once (not printed out) and then a second time to print only those w/out bad addresses?

(CP) 1098 do not print; no IRS report (?) She will check with Raye Ann.

(CA) What about using the Tax Address in Banner?

Holds—as leverage to get students to keep address and contact information current.

(AT) Using holds to have them provide updated contact information is something we should try and avoid—she is not in favor using this to hold up registration. Previous experience with Hold and Release mechanism was debilitating to both students and staff.

In response to repercussions for not complying with Fed Reg's on tax info: campus levied a fine...

**NEW SUBJECT—Sort of...**

OE: Periodically no OE address in system for student; VISA Student have an AK OE address—their originating nations needs to be indicated and entered into Banner. Even if they are already in US (at another school for example) the origin of entry needs to be correctly identified and entered.

Julie sends lists to Juneau to Bruce Gifford; to Fairbanks (Becky Norris) and to Anchorage (Deb Lovaas). Kim asked that the lists be sent to her at UAS.

Karen W's request was denied.

Consensus was that for parts of terms we stick with the current naming convention.

Julie from IR reminded us that deviations from the current rules would severely impact reporting.

(PI) Asked about SFAREGS—part of term—would we lose the 2<sup>nd</sup> character—from the current 3-character field?

(CB) asked about non-proportional font.

(JJ) something we are trying to resolve.

END of minutes.

**Next meeting: 04-26-01**