

Participants

Debra Gordon, Alabama A&M
Louisiana State University @ Eunice (Gracie Guillory Dir. Was not present.. had a stand in)
Trina Smith –Patterson, Tarrant Co. CC
Linda Embry, Northeast State Tech CC
Mary Givhan, Mississippi College
David Gruen, University of Denver
Randy McCready, Marquette University
Sue Grant, University of Notre Dame
Dave Cecil, Transylvania University
Jarrod Gunhammer, Sinte Gleska University
Sue O’Flaherty, Western Michigan University
Pat Kennedy, Oklahoma State University
Maria Whitaker, Johns Hopkins University
Virginia Washington, IUPUI
Keith Simpson, Edge Technologies
Bonnie Joerschke,, Purdue University
Pam Fowler, University of Michigan
Susan Little, University of Georgia
Ellen Frishberg, Johns Hopkins
Gary Garoffolo, Mod Partner
Dee Dee Gonzalez, Southwest Texas State
Joan Zanders, Northeast CC
Etta Fleischer, Nova Southeastern
David Gelinas, University of the South
Judy Florian, Macomb CC
Paul Phillips, CSU-San Marcos
David Sheridan, Dean of Enrollment Services, Stevens Institute of Technology, Hoboken, NJ
Sue Weinreiss, Montana St.-Billings
Dan Davenport, University of Idaho
Manny DeJesus, Edge Technologies
Elaine Neely-Eacona, Quest Education Corp.
Roberta Johnson, Iowa State University
Patty Harris, University of Minnesota Twin Cities
Tom Babel, Devry Institute
Michaelyn Miladantri, SFA
Colleen Miller, SFA
Sandi Foy McCabe, SFA
Mary Haldane, SFA
Mark Raulins, Mod Partner
Tyson Bondurant, Mod Partner
Eric Campbell, Mod Partner
Scott Gould, Exolve
Bart Vandissel, Exolve
Drew Johnson, Exolve

Meeting

Gary Garoffolo (intro): A little bit about the background for this. I won't ask if you have all been out on the website to read the blueprint...all 800 pages of that. Hopefully, you've had a chance to look at the executive summary. This is all part of the SFA's blueprint and looking toward the future and moving forward. The portal is one of the first steps at movement forward, so we are trying to make the beta more accessible to you...provide you with easy links to others and the Dept. of Ed websites and provide you with some functionality, as well. This is version 1 of the portal. There are proposed, at least 2 other versions, before this is all said and done. Each version will add to the functionality and are some great things happening. We felt very strongly about getting input into this from the community. I've been around long enough to know that you will provide input. Regarding this concept, what you like about it, what you may like to change about it. Turns out this works for you and it's extremely important, for us to build something here that is both user friendly, functional and optimally something that you would like to see and like to use. So this will be again, 1 of 2 sessions that we will conduct like this. We still have every desire to do something face to face. For those of you coming to Nassau, we will try to nail that down and do something face to face at the third meeting. There will be a major presentation at Nassau about the project itself and where the school's channel portal is in the process and how we are going to move forward.

We have entered the building design phase, obviously after the business requirements were drafted and written with internal input. We are now in the building design phase and happy to have you with us, as we go over what we have now as an initial offering in terms of the portal itself.

Bart (from Exolve) , will do a walk-through with you. He will walk you through the portal and provide you with the functionality that exists. Please don't hesitate to ask questions.

Bart: Walking through the functionality of the portal, let me start with just an overview of the core functionality that we are seeking to build and deploy in Version 1.0

1. The first piece of functionality is to provide very easy access to a core set of SFA links...websites that people typically go to carry out their business. The intent was to provide you with one place where you can get to all of those sites with one click access.

On the left hand side of the portal that you're looking at, the category of SFA links, and here with input internally as to what are some of the key websites that people use, we tried to organize them into logical groupings and make them very accessible. We will click on those and show you how they will float on the screen.

2. Second piece of core functionality....Search. The ability to go out and search each of these websites with various forms of search that you are familiar with, if you've been using the web. Whether that is natural language searches, keywords, what have you. There are a couple of different options for search. You can search just the IPATH database or you can search websites that are listed.
3. Third piece of functionality....looking at the My SFA. This has to do with customization. We will turn to a personal page in a few minutes and ask for your feedback on that. In which you can take a small set of these links and identify which are most important to you. You can find your

preferences, as to what kind of news or other events you would like have flow to you, very much like a My Yahoo, again if you are familiar with that on the web.

4. Some other types of functionality that we have incorporated into the site, are in the form of news or SFA headlines, which you see up top. This speaks to events that are going on in SFA that we think may be of interest to the community as a whole to see. And as you see on the personal page there are some options to look at even broader news sources of your choosing.

Scroll down to the Calendar of Events...the bottom section is a notification or calendar of events that are coming up for SFA...various conferences, various deadlines, around forms, activities that need to be carried out during the academic year and what have you. The intent is to provide you all in a friendly manner, notification of what are those things you need to be putting on your own calendars or keying up as activities ahead of time.

That is the walk-through very quickly and we will go into the site itself and get some feed back and some other things. But overall those are the core functionalities we are striving to put on the site in this first version.

Bart: Any questions at this point?

Q: This seems to be similar to IFAP, is this the more “modern” version of IFAP?

Bart: Colleen, would you like to.....?

Colleen: IFAP will become the library of the portal, and will continue to provide you with the SFA publications, but we are trying to make, as Gary and Bart had suggested just a one stop shop for school, SFA data exchange. We know that you currently visit several different sites, SFA web sites to perform your business and administer the aid. We are trying to put that all together. Right now it's just starting with a common starting point and eventually the systems will be more tightly integrated into the portal and that will come in future release.

Q: What you are saying is IFAP will remain there as a resource to this portal?

Colleen: Yes, it will. Yes, it will absolutely. All the information that is currently available on IFAP and all the functionality will still be available to you through the portal.

Q: Are you also saying that currently with NSLDS we have to get the signature of our President and the Pope and that will no longer have to do that.

Q: Do you foresee that security and access to all of the various places we need to go will come from this page? Where we will go in once and not have to reprove who we are?

Bart: Yes, that is the vision.

Colleen: This is the first version, but that is what we are building to in future versions.

Bart: This architecture, what we are laying out here, has been very much created with exactly that functionality in mind.

Q: What about a listserv? Will this include the listservs.... sending things to different people through this website. If we have questions....

Colleen: Yes, technical support provides a listserv for SFA issues. And there will be feedback areas, very hard to see, at the very bottom of the page in small print. There is a feedback and a contact area where you can either comment on the site, or if you are having difficulties navigating or locating items that you use to be able to find, you may contact us and we will be happy to help you get through this new environment.

Q: Do you anticipate keeping the subscription service with the push to get daily information as available as part of this as well.

Colleen: Yes, we do. We will not lose any current IFAP functionality.

Bart: And that is the same for all the sites. It has been a design principal to preserve all the functionality of all the underlying sites.

Q: Have you talked about how we sign people up for this and make changes to different staff as they come and go?

Bart: The approach to that currently would be to use whatever the existing processes are for defining who has access to which sites. So we are working within the existing processes and existing mechanisms for carrying out that particular function.

Q: One of the areas that I was concerned about and that we had discussed in Washington is the ability to access more than one school's information from a district or regional level. Do you have the ability to do that with this site?

A: That is something we are striving for in future release, but not in this first release, which we are targeting to come out.

Bart: Simply from a technology perspective of what is being put in place, or core technology underneath this site...It will in fact, allow that functionality of looking at different levels of content or data and also allow the creation of communities. Group of people organized around common sets of issues and interests to be implemented in a relatively straightforward fashion. The intent here has been to provide simple functionality in the first iteration of the site, something that is very achievable and we think is getting a first cut at capabilities out there. But to build a very robust architecture underneath this which will allow us all to move toward those kinds of requirements very quickly.

Colleen: And may I add, coupled as Gary mentioned the modernization blueprint, as I am sure you are all well aware, we have various separate and distinct systems for the various programs. A part of the modernization blueprint is to bring all of those systems into a common directory, if you will and share common items and not have duplication and that will really facilitate the kinds of things that you

are talking about then. When we have all of our data stores in one location and that is spoken about in much more detail in the modernization blueprint.

Q: Any edges on timely departure? I didn't hear what date this was scheduled for release, can that be repeated please?

A: The first version, this one you are looking at with a little more functionality than what we are able to display for today is targeted for or about for unveiling about September 30 of this year.

Q: Any other questions at this time? Then we will show you more.

Bart: Ok, I would suggest that we start looking at the SFA link group. Every everyone can click on and I am going to pick one at random....a blue one. ...that's under Student records and NSLDS. Sorry that's the category.

■ *Technical difficulties ensue – People are lost and on the wrong page –*

Bart: Just to once again, set expectations, this is the first version of this interface we have put out there. It has some functionality but it's not at all lit up, if you will in all sites. What we wanted to do was provide enough functionality that we could solicit your feedback as to the ease of use and whether this works for you. So please, as we are clicking through links please give us feedback relative to that or anything else.

Feedback: Just an observation, I know we all who have been in financial aid, typically know what all these acronyms mean, but it might be helpful when that little hand goes over an acronym a little bubble could appear and would spell out what that acronym is.

Colleen: What we want to demonstrate here is that when you clicked on PEPs a second window came forward when we went to that site. So your portal is still behind the window that is in the front now.

Bart: Ok....Any comments on this notion of floating pages, if you will in the underlying portal site?

General murmur: They like it

Q: Let me ask a question about access again...Now when we go into PEPs we would have to sign in again with a PEPs password or is it your intention that eventually...one access would get us into all these separate pages that come up?

Colleen: The answer to the question is, yes. Initially, you will have to use your separate logon for the separate sites, none of that is changing we are just bringing it all to you at one entry place to all those systems. But ultimately in future iteration, we are working so that each of you will have a single ID with SFA and you will be able to access all of the systems to which you should have access with that single logon.

Q: And when you say that, do you mean as defined by the Department of Ed. or as defined by someone at that particular school?

Colleen: I am not certain about the exact format of the id yet, There are certain security requirements we have to follow in terms of the construct, we do however know after making the initial that generally maybe you people on the phone will be granted the initial access, but similar to what is being done in direct loan servicing you will be able to setup access for others at your school yourself. You will have that control.

Q: I am at the point right now that I want to sign up more people up for NSLDS access, but what I hear you saying that is possibly instead of going through that long drawn out process to do that, if we are just patient I can just sign those people up myself through this portal access.

Colleen: Theoretically, yes. But patience is a matter of how long you want to wait.

Feedback (Kitty Wooly): In the past you've had database straight to the various systems you've been assigned on a need to know basis by the Department. That is not going to change, so if you have new users that have never gone through the security process, the long, drawn out process, that is not going to go away. That is not to say that we couldn't make the long, drawn out process shorter, if you could give us some feedback on that separately, we would really appreciate that. What Colleen and Bart are getting at is that the people (which I think 3 or 4 of you have asked about) who do have privileges to those secured systems like RFMS, NSLDS will be able to get into the portal, logon when you first get in and get to everything you have rights to that you need to have to do your work without further logon. But in terms of new people that haven't gone through the security process, yes they will always have to go through the security process because those are Federal databases, that won't change. But what I am hearing is that, it's a hassle for us here too, and if you could give some description of the hassle and timeframes you have encountered, we could work on that from this end.

Comment: It must be difficult to get the President's signature for someone to get NSLDS

Comment: I would think that authority could reside with the Director of Financial Aid rather than the President. (general consensus)

Colleen: If I recall correctly, that was a hot topic at the electronic access conferences in the fall and it was duly noted by Greg Woods and all of our senior management. I believe there is group working on that, but I don't know the status. I can look into that for you .

Bart: We can now go back to the main home page. What we wanted to show you was the ability to float that screen and website and be able to work in that website with having the portal open. Again, you can click back and forth between those pages as you normally would on the web and so that is basically the functionality associated with the My links access here. And we've touched on a set of rich topics, announcing logon, as well in that context. The next thing to talk about is the search tool. And here we have a search tool, a very powerful search engine. The name of it is Autonomy. I don't think we want to go into all the technical aspects of that. It's a search engine that actually learns over time and will be very powerful in helping us to more efficiently organize the kinds of content people are looking for. We have identified a couple of searches you might do. If you were to click on the options for search... There are a couple of different searches we thought you might be interested in. Again, time for feedback.

On the first option, all SFA link and IFAP database is covering all the links on the left hand side and the IFAP database.

- *Technical difficulties ensue and are corrected with back button* -

Bart: So under search you have three options here. *First*, Search all of the sites that are accessible through the portal; *Second*, search just the SFA links and just to be clear of what is searched here...there is no search of the underlying transaction databases here because those are secure databases. What is available is all the content on each of these sites that can accessed that called non-secure or those that don't require clearance to get there. And the third search is just the search of the IFAP database itself.

Q: I guess I don't understand what is the difference between the IFAP dbase and the SFA dbase. And my other point would be, that maybe it would be nice to put in parenthesis secured and unsecured searches.

Bart: Just to be clear again, from the portal itself you cannot search any information that requires you to logon, So that by definition you can only search publicly accessible content.

Q: So you can't search secure data, is what you are saying?

Bart: You do have the ability within the individual website to search the underlying dbase, I believe where that search capability already exists today. Again, we preserved all the existing functionality.

Q: I would like a more narrow search too, like just regulations. I don't want to get everything if I am looking for satisfactory progress in its regulatory definition.

A: You can do that, if you look under SFA links...in the category online library. The first bullet, they are all SFA publications is the IFAP store. All the publications that are on IFAP...it will take you to the current SFA publication page or what we use to call the bookshelf page and then you can select from there the document type you want to search on and the good news is that IFAP is also benefiting from this much more robust search engine it will be improved as well. Which I am sure is good news for everyone.

Q: So if I click on that, then I click on regulations and then I get a search engine?

A: Right

Q: Is that functional now, can we do that now?

A: No, I'm afraid that link isn't live yet.

Q: I have the same concern as Tom does, I assume that was Tom... And it should be not just regulations, but statute and handbook and all of those places we go to look for a reference and want to cross-reference, but you don't want every dear colleague letter to pop up like it does now when you are doing a search.

Q: Then you could do that on the personal page, could you not?

A (Bart): The personal page does search just the links you have specified as the ones you want to show up on your personal page, but I am hearing a couple of things. Well one thing really, we want to be able to do very focused, narrow searches. And we will take that input and look at what can be done within the capabilities of the search engine to provide that. I can't give you a definitive answer right now.

Feedback: Perhaps under the online library, you need to word it differently, because sometimes when people think of publication they don't think of a regulation as a publication. So maybe it's just a matter of terminology.

Q: Do you have a suggestion?

Feedback: Right when people look at CFR, they don't know what that means.... Code of Federal Regulations... not everyone knows

Feedback: And you want to have a separate line on the online library that just says regulations. I know you don't want to have these too narrow because it takes up a lot of space but, or you have one item that just says 'dear colleague' letters.

Bart: If I could suggest, the options we have and the questions to consider are the following: if in fact we feel that a narrow search like regulations there is a broad based need to have that as an option on the home page, that's great input and we will change the links on the home page to reflect what you all say is most useful. There is an option on the personal page to define your own links. So if in fact regulations is a link that you all feel and use in your work a great deal you may want to go to your personal page and have that link there and then be able to directly use that for yourself. We wanted to be able to give people the option to customize sets of links.

Q: But if I do that on my personal page and I say that I want it just to be regulations, does that mean its going to go to the SFA publications area? I mean, I can't define that can I?

A: Unless it's a separate link just for regulations, but you can go into the SFA publications area, narrow the search to that area. Again I think this all comes down to the issue of narrow search. You all are giving us great input regarding the ability to search a narrow set of information without getting back all the other returns that you probably get. Again as oppose to trying to solve this online, we will take back your input and see what is feasible and hopefully within the next generation of this design process, which should take place within the next 10 days or so we will have an answer for you as to what is doable.

Feedback: Just a general comment, as I look at the choices on the left hand side, there are some that the access is very infrequently such as the quality insurance conference, and it seems to me that in looking at some of those and merging them, maybe having training conferences without any sub-areas and creating room for such things as regulations and handbook, dear colleague letters, might make sense.

Bart: Do we have the feedback mechanism in place? I'm asking the question internally. We are just checking now. You guys are giving some very valuable feedback to what you feel are important links

to put up on the site and what to consolidate. If it is possible for each of you to send us that input in an email....and we are checking now if the feedback capability is up. If not we will find a mechanism and give you an email to send that input in, because that is exactly the kind of input we are seeking.

Gary: The feedback mechanism comes back to me...ggaroffolo@kpmg.com

Bart: Specifically, what we are looking for in the MY Links area, additional links that you think would be of great value and where you see the opportunity to actually drop links or consolidate as you just suggested.

Gary: You might also add Bart, if you would like to see a header change send that along too.

Feedback: Some of what you are asking is difficult because we may know what we want to get to but we don't know how to get there or where it may reside, for example I needed a copy of my ECAR and I don't have a clue as to where to do this electronically. So things like that I mean, you would set it up under my SFA but where ...it's kind of like the chicken before the egg question. We know what we need but we may not know where you have it residing.

Q: Is there any plan in the future to put the Department of Ed. database on here to link to individuals?

A: A directory or expert locator if you will? Good suggestion.

A: It's part of the contact desk reference, but yeah we'll take that back ...that's not specific.

Feedback: It would be nice if the pages we pulled up had contact references attached on them. You know especially for your region or part of the country or however its divided up.

Feedback: And not just an email address saying 'to contact us'...the real names, an email or a phone number...whatever.

A: That's pretty much the intent.

Feedback: As a suggestion with regards to the link, maybe you can check databases to see which area are the highly hit databases, for example the quality insurance is probably pretty limited, there maybe other one that we as users don't go to often, but as a whole people go to the link greater.

Bart: Right and that is you know monitoring that as we go forward is a very core part of what we are seeking to do and it also part of the capability that will be a part of the autonomy search engine too. When we see the kinds of things you are using the search engine for, we will get a strong sense of where you are going and that will inform us better about what links we want to put up in the left hand column.

Comment: In addition, and jumping ahead and when you get to the personalized portal page, you can determine which links are pertinent to you and which are not and remove those you will not access. If you don't utilize the direct loan program then, you probably don't care about the direct loan site. Likewise the quality insurance program, and you will be able to customize a set of links on your personal portal page.

Bart: It maybe useful at this point to go to the portal personalized home page. Hit the Go button, under my SFA.

Okay we are at Kay's personalized page. And again this screen is still under design and there things that will change a little bit. If you look at the links list and here you are able to select a subset of the links that were on the generic home page. The intent here is to select just those link areas that are most important to you, those web sites.

Q: And we will be able to use this as our default sign-on in the morning?

A: Yes, absolutely.

Bart: Yes, I do believe you don't have to go through the generic home page to get to this particular personal page but you will have to go through a logon. And that of course is to store your personal preferences, such as what links you would like to have on this page.

Q: So would the logon be similar to what we do now, if we are say a Chronicle of Higher Ed. subscriber where the box comes up asking for a name and ID?

A: Very much so.

Bart: And you will also note on the links here, something that is different from the previous page, the lower part of the links box we have a category called My Links, which allows you to add bookmarks or customize a set of links you typically might go to. We've had some suggestions internally, of areas that people here might be interested in going to other sites...like Chronicle of Higher Ed., or a number of other sources which are education related or news, headline information. We kept it pretty much at focus. The site here has been designed to be highly functional, very focused on education and the kinds of transactions and interactions that we understand you all to be doing with SFA. We didn't try to design a site that was a blotter, kind of portal site as you might see on the web, which would have like stock quotes and search for new cars and what have you. We want to keep this very functionally focused. The question is have we been too functionally focused? We don't have too many graphics so it will be faster to download and again we may have gone to an extreme here, so we would like your input.

Feedback: I'm glad there are no things jumping around the page to distract my attention.

Bart: Is that a good thing or a bad thing?

A: That's a good thing.

Feedback: I'd like a people locator.

Bart: Right, that is excellent input. That is a very common request.

Feedback: I know this is a preliminary site, but I would like to make a request to make the print as large as possible I have pretty good eyesight and this is driving me nuts to look at this all day long, it's too small.

A: That can be set-up by your own computer.

Bart: There's that option, but also if we say go back to the home page and look at the my Links block, the question is should all of these links be made explicit and transparent. Our design objective was to allow you one click access, but one could imagine when you are running your mouse over a category such as exchange data you would see a drop down menu of links. Is there a preference one way or the other?

A: I like it the way it is...

A: me too

A: I like it too.

A: Indifferent

Q: How is the My Link's section setup? Would there be a set of prescribed possibilities and choices or Is someone just free to find whatever links they want and add them in?

A: We've been careful not to provide a prescribed set of choices. Our concern is that somehow prescribed sets of choices may imply endorsement.

Comment: Understandable, some people will prefer the NY Times to the Washington Post, but then it kind of goes back to your comment of making it very topical and there is no way in keeping someone from linking their thing up to EBay or something like that.

Comment: That's correct and since we would like for you to get use to this being your homepage we would like for you to have the flexibility to personalize it to the things that are of interest to you besides your work for 20 hours a day.

Q: Now in that category as we look at your personal page, we did put local weather up there as an area and it consumes real estate. The question is do we really want that there are not?

A: Do we care?

A: I don't care

A: I can look out the window and get the local weather.

A: Is that something we can put on and take off like when we create a yahoo page? So it's an option?

Bart: how about up in the left hand corner, the notion of putting up your school logo, or a graphic that represents your school.

A: Naw

A: We know who we are.

A: But on a district level, so you would know what school you were in, when we get to the point where we have the ability to do that. And you are in a district level and you're dealing with more than one school....

A: No because you would have to import that graphic into your personal page and it wouldn't change at every location you are at.

A: I wouldn't say that it is necessary, but if we had to free up more space for something else, I'd say we could probably eliminate it.

Bart: I am hearing a strong proclivity to what is functional and take the rest off.

Feedback: ... taking up real estate on my calendar of events, when the little hand comes up and you can click, why do you have to have those days and events all the way over there?

Q: And where is this coming from? Is this from Outlook or we pulling this in from somewhere?

Bart: No, this is coming from an events dbase that is maintained by SFA

Comment: So it's not your personal calendar?

A: No, it's not.... it's really meant to notify you of upcoming deadlines and events.

Feedback: why not just click, a single click on there to take you there as oppose to having it displayed taking up real estate?

Bart: So the notion of calendar of events, but we would like it more of a link

Feedback: I actually like it the way it is because I don't have to click I can just look at it and say oh this might be important.

Feedback: I like it that way too....I may not go on in to click each one of those numbers to see what's coming up.

Feedback: I like it the way it is, but I would just leave the calendar and is there anyway can we link our personal calendar to it?

Bart: Not in version 1.0

Feedback: I also like it the way it is.

Q: Then you have to ultimately ask, when can you put an n-sync thing in for your Palm pilot? Just joking there.

Q: Will we be able to set up a link for our email...for our offices, from our personal pager. Because I right now I have to close down my browser and go into Outlook and open up.

A: Good suggestion....access email or have email capability coming out of the portal.

Feedback: It would help on the calendar of events if there were options we could pick, like if you are not a quality insurance school you don't care about the deadlines for that report, or if you're not a direct loan school, you don't care about that the origination center is going to be closed...

Bart: Well, you know the notion behind the personal home page is that you can filter the events and the content in the events page and just pull up events that are of interest to you. We don't know if we will have this on version 1.0. the underlying functionality and architecture is there. The general notion being I would like topic basic filtering of the events. And there are ways we can do that. We could replace the text on the right hand side of the events calendar where they set up topics.

Q: Is there a general feeling that this might be useful?

A: yes

Feedback: I have a layout question, you have got the ability to click on the date of the month, what is the advantage in having the 7-day layout next door to it?

Feedback: That was my question.

Feedback: You can't click on it except on the events side, it's redundant. I am thinking that if you are talking about a real estate problem, I would take the calendar format and put it where local weather is and clear out that block down below for other information.

Gary: The purpose of that is to show the events of this week by name, if only the calendar was there you would have to click on the calendar to see those events.

Q: And is what is the problem with clicking on the 15th and saying hey, let's see what I should know. I can do the exact same thing on the right hand side, and it seems kind of redundant.

A: Since you are always seeing what you would need to know....

Bart: It's good input as to your preferences around this, but to some of this it makes perfectly the right sense to and that text on the right is of interest. So it's an interesting dilemma to try and satisfy everyone here.

Feedback: The way I see the difference between the two is that the calendar on the left, you can click forward out to August and click on a particular date and see what events are taking place on that day. The events calendar on the right are what 's really what is out there on that particular week in a real calendar.

A: ...the links that are enabled on this particular page as being the one that's functional at all, especially on the my SFA pageSo nothing is enable in here... if we go back to the home page... my SFA.

Q: So you want us at the home page?

A: Now if you click on a date at the home page.....you are able to do that....

Q: Do we really want to use up real estate on the home page or personal page with the upcoming week's events or not and direct access to those?

Q: I am still not clear, when I get this and it's fully developed and lets say I was to click on the 15th on the calendar and I were to click on this day's events on the right hand side, would the results be identical?

A: no

A: If you were to click on an event, that listed there it would take you to the specifics of that one event.

A: Right, I think I am understanding now. Where it now says this days events, there will be a specific event associated with that date and it will take you to an announcement, or a dear colleague's letter, or something that will give you more details about that event.

Q: What if you don't know the date?

A: Well, eventually we will create the ability to search the events database.

Q: Is the intention only to list SFA events?

A: Yes

Q: The way NASFA lists important dates for people in the community and are able to contribute events to their calendar may be useful, since we have events outside SFA to keep track of.

Feedback: I think I am in the minority but I think that if these are just SFA events, I don't think it's going to be that heavily used and I think it's taking up an enormous amount of real estate for what's going to be not nearly as much use, than if we were to get more choices with one click on the left hand side.

Feedback: *General consensus – most agree*

Comment: If this our attempt to address a request that and maybe we haven't implemented it correctly, but we've been told the SFA needs to provide the schools with a calendar of events of when due dates are coming up and when publications are coming out...is there a better way to present that to you?

A: Put it as a link (*General consensus- don't put it as a calendar, put it as a link*)

Bart: What we are hearing is that it doesn't merit the primacy of consuming space on the personal page or the home page.

Feedback: Well let me be the voice of dissent, I would like critical dates like reminders and other dates and deadlines that warrant remaining on that page

Bart: Could we as an alternative option, instead of trying to use the organization metaphor of a calendar up here, which is date oriented, if we were to have similar to the headlines box a set of list of upcoming events. Would that be an alternative that might work?

Feedback: I don't know if anyone has seen the AOL, instant messaging that you can get over the website. A ticker tape bar that goes across the top of different news events and you can click on an event as it goes by and it brings up the details on that event.

Feedback: I would rather than have anything moving by on the screen, see it as SFA news.

Feedback: You can put it on the SFA headlines and have them click where it says deadline.

Feedback: ...deadline or have that as the news item, I mean, who ever is going to be the webmaster can maintain this is going to be bringing up new stuff all the time. I would expect that if it's the last day for students to file FASFA, it would be nice have that as a reminder.

Bart: I like that suggestion. What do you think about that?

A: Well Ellen touched on something about classifying this thing. For all the calendar of events, can we created certain categories so the school to use some categories and others....like I don't really care about training but I do care about deadlines.

Bart: Deadlines is clearly an important category.

Feedback: Some people may not consider a deadline an event. An event sounds like a conference or training activity, so you probably need to term it differently....'reporting deadlines' or something like that.

I think we run the risk of having too many categories at some point. Events, deadlines, conferences, training....etc.. I think an event is relatively understood by everyone and would cover everything. And we want to keep this as broad as possible, sometimes we need to know in June what is taking place in the following February to track different events and deadlines.

Q: Is the calendar is searchable?

A: Yes, the events will be searchable.

Feedback: I would opt for two categories, events and headlines and nothing else, I think those are sufficiently separate.

Feedback: We keep speaking about submission deadlines, we had also envisioned a page of notice to propose rule making deadlines and comment period deadlines, in your mind can those fall into that category or are these something different?

A: No, I think that would be a very helpful macro thing for the profession to be aware of. We are very content with the micro dates, but we need to be concerned with the macro dates, such as responding to NPRMs.

Q: Would we have both in the category of deadline?

A: My personal feeling is that it would be good to know that this is the last day to respond to this given MPRM.

Feedback: It would also be helpful to know this a week in advance of this date.

Feedback: Do you care if the NPRM's is about to(intelligible)or do you only want to know if it's about things you are participating in like general provisions?

Bart: Events it sounds like has some subsets. 1. I'd like to be able to see all the events that are coming up next June, so I can start planning ; it would be nice to have a link that shows me a calendar representation of a set of events; 2. Interesting deadlines, things that are coming up that are important and I might want to be able to subset that by topical areas and 3. What are the open areas (open NPRMs) I think you called them, that are currently open and should be cognizant of and perhaps once again, organized by topic, so can I click on them see what's the deadline for the topic of that MPRM. These are 3 specific points that I heard and that may be a good way to organize this whole area of events.

Feedback: Or would a separate MPRM link be better?

Bart: Well, I am thinking of it as an almost header of events with three links under it , calendar, deadlines, and NPRM's and then when you clicked on any of those you would get a topical split. I was thinking of a broad category called vents and then it would bring up and it will show it to me by calendar and let me click on deadline or open NPRMs.

Q: What would you think about having a category and a dropdown box on my search for calendar and having it subdivided out into the different types...

A: The one thing that concerns me about the calendar and now I am beginning to see why the MySFA page is looking more desirable to set it up how I want it. The whole struggle with technology today and going paperless, especially for those of us who lived in a paper filled world...We read the paper that came by our desk, the NASFA news that came by, now that doesn't come by, how often do we go out and to a link to read it? But if it comes out on a web page and it's before us, at least I would be more apt to read something right there as oppose to searching it out.

Q: What about having a button on the main page for the calendar and then having it go to another page for all the other things that we've spoken of.

A: I would rather have some of these things in front of me, so I am being reminded , but I guess that's why if I can massage this page to fulfill my desires then I will be happy.

Bart: I am also hearing a category of full capabilities, which is there are certain sites that I would like to be cognizant of and be able to set up my preferences to monitor those sites, so that when an article of interest occurs it will perhaps populate my headline box with that articles or content that I have set my preferences to continually monitor and bring things to me.

Q: Under training, was there any discussion about having training listed by region as oppose to chronologically? Being from region 4, I really can't go to Utah or New Jersey for training and would hate to have to scan through all those chronological dates in order to find some training.

A: That's a valid comment, that we need something up front that give geographical location, whether it's even worth your time to look. We will look into that.

Q: I would like to have the national information available, if that's possible?

Q: Is it possible to format it by region, by date as a way of searching for it?

A: There should be, yes.

Comments – General consensus on searching training by region and date

Bart: Without knowing how the data is stored and coded, we hear it as a request and requirement that we need to be able to provide a regional or district cut at these events and we can look to see what exists and if this is possible.

Comments: alternate ways of looking at the information. That's very helpful input.

- *Bad reception, static* -

Bart: Let's go back to the My SFA page and further back onto the Home Page. We haven't really touched on the SFA headline. The notion here is that SFA related news will be manage and populated here for a defined period of time, somewhere around a week or so. These would be key matters of interest or internal matters, so if Sallie Mae and USA Group to merge, you would be able to get access to, in this case an article that came out today and be able to get to that direct news. It's news that has been monitored, managed and selected by folks here at SFA, that is determined to be of interest by folks here.

Comment: That's not Department of Ed. related, it's general SFA news.

Comment: This would include systems alert, if something might happen, or scheduled downtime or holiday schedule, we will be sure to put those in the headlines so that you will be aware of events that would effect your ability to access our systems and site.

Comment: It would include interests to Student Financial Aid administrators, and not necessarily just student financial aid issues.

Q: Do you have the ability to set it up so that it's going out and searching the web for new articles relating to financial aid issues and higher education so it's not a labor intensive process?

A: Not in version 1.0

Q: Will there be an archives that we can check past headlines, in case we are out of the office?

A: There should be a dbase of headlines and content maintaining so there should be an archive of content it should be searchable.

Q: How long will the headlines stay out there?

A: We will have to make a decision on how we keep the content that is current vs. what is archival in nature. We don't want to give you yesterday's headlines, unless you are specifically looking for yesterday's headline.

Comment: If I am out of the office, then I would like the ability to see what I have missed.

Bart: The notion of archiving the headlines and having access to some archived headlines is a good suggestion.

Comment: I have a suggestion about IFAP as well, I accidentally deleted a newsletter I received from them and I couldn't go back and find the document, so it would be good if somehow we can go back and find those types of documents.

Q: Will this section also contain today's 'dear colleague letters' and announcements?

Comment: I guess I would like to know what came out today in SFA today?

A: The subscription service on IFAP will continue

Comment: Maybe it's the coding of the document itself and it couldn't be tracked back in IFAP.

Comment: We expect to be able to deploy on IFAP with the emergence of the school portal, under the SFA links and the online library, you have publications and also an entry to publications, but topic. We have been categorizing them, in relation to what SFA program they relate to and the topic associated with that and present that back to you. So if you don't know in what publication to look for a piece of information, lets say on the Pell program, you can select the program and topic and your returns will address that topic. That might be another way to identify something topically.

Feedback: There is a difference between articles and like general nice information. For example the Change in Dependent Student's Methodology is a major hit for Financial Aid people and I see that as a real critical thing. I think that there are differences there that need to be noted....that you can click on and get access to. As oppose to going to the online library and trying to make some decision and read listening to wording of some rule.

Feedback: Possibly put a date for whenever that article will be, the date it was posted. Putting it next to it realizing there are space constraints. Or separate the two with Dept. of Ed headlines and general education headlines. I also realize that you don't want to get the page to full.

Bart: But there are important distinctions on policy and rule changes that are important to people and general news, whether general or SFA specific....that's a good suggestion.

Q: Am I to presume that, down the road we (PC schools, or combination schools) will be transmitting our data via this site? Where the internet gateway is, transmitting the title for WAN data, is it going to go through this? I see this SFA download site, under the bookstore, which I think would be better under the exchange data, am I correct in that and if so....

A: I think you are correct in that.

Q: ...if we are going that way....does anyone know where I am going with this?

Q: Do we have to respond to this link on this portal in order to do our day-to-day business transactions?

A: Yes, that's the intent

Feedback: then it needs to be moved to a much more prominent place than the bottom left. It really should be one of those boxes because that's something that happens on a day to day basis.

Feedback: And there would be a separate link as oppose to just the SFA download link, because I view that as downloading the latest version of Express orthere would be another link saying transmission.

Bart: You are making a general distinction between content and a transaction capability, which you are getting into the underlying systems to perform the work that you do that involves data exchange.

Comment: Again as the modernization blueprint proceeds, and we move into the common origination and disbursement methodology there is one path to send us data, but right now they are separate stovepipe systems that we are trying to move into one.

Bart: It is intended that this will be the single entry point, eventually for accessing information as well as carrying out transactions.

Q: when you are looking at developing this you always have to go back to the lowest common denominator and think of the schools that don't have the resources to keep up with the latest technology. It's not the public schools that have significant budgets and are going to have an easy time getting onto these web sites, it's these other school which have just gotten the technology that was required 2 years ago, they are just getting in the year 2000. And I think that in developing some of the technology for the Dept. of Ed, that that is sometimes forgotten. But this seems to be user friendly enough.

Comment: That's a good point and we did try to keep this in mind as we developed the page. Those who meet the Y2K requirements....we recognize that there are those who don't have the most up to date software or hardware.

Q: In relation to this...there is a particular company doing this site, will this same company be doing other Dept. of Ed sites? The reason I am asking is, if I go into Netscape Navigator I cannot get into the RFMS web page because of some glitch that has happened in Netscape for Macintosh, so, I guess I am saying is there going to be a suggested browser that is going to be recommended?

A: yes

Comment: With respect to that particular page, we found an interesting bit of code on that site that takes over the browser. We have isolated the code and are requesting a code change. I can't say that it will fix that problem, but...

Bart: Coming back to the portal page....are we missing something that is critical and needed? Recognizing that there are underlying system constraints.

Q: I wonder if there should be more of a distinction between some functions that are more financial management vs. Financial aid related, such as GAPS, which rides the fence between comptroller, making more categorized in that way. I struggle, when I look at this, data exchange is where I can get to real person data, well no that's transmission back and forth, student records is where I can get live data. That's the way I think down those different topics and the financial end of things seems to be missing, the financial management system.

Q: As a unique explicit category?

A: Right, I can foresee a comptroller looking to do draw downs, yeah they might know that that GAPS is there, but I don't know, it just doesn't stand out to me.

Bart: ok, anything else?

Feedback: Unfortunately, we probably aren't going to know what's missing until we start to use it.

Bart: Well, that's true. We wanted to make sure that if there was anything top of mind that we haven't quite captured yet. There is plenty of time to think about this too. You've all provided tremendous input and feedback. We will go work as much of this as possible and develop a next generation which is targeted for June 26, Monday, I believe from 2:00 to 4:00 and incorporate those comments and play that back to you. We are going to leave the site up and accessible through Tuesday, so if you think of something we are soliciting input through Tuesday.

Comment: We have a link up for feedback, which hyperlinks to a Word document with a specific survey feedback questionnaire, with Gary's email as the return address.

Bart: Will he be able to make all of the other design changes that have been suggested by 4:00 pm.

Bart: Is everybody at the portal questionnaire?

- *Confusion ensues - looking for feedback -*

Comment: Does everybody have Microsoft Word?

Randy: So that means Microsoft has a monopoly over all these schools? I don't know what gave me that idea.

Feedback: I can offer one more comment about the My personalized home page? Will there be directions on how to create your own links?

Bart: Yes, we will be providing all of that help as part of what we are delivering here. Yes.

Comments: All the pages about customization are not ready yet. We haven't shown any those or a button on even how to customize, they are not on there, but all of that is coming.

Q: Will be meeting in person in Nassau?

A: We have every intent on trying to that, yes.

Comment: If that's the case, I would suggest that make a meeting time very quickly, since our calendars fill up fast.

Bart: Any other comments or questions?

General consensus: Looks Good, Thanks for letting us give input

Bart: Thanks for coming.

