

## **Foundation Weekly Meeting Minutes**

**May 17, 2011, 9:00am-10:00am**

Attendees: Jennifer Dirking, Laura Woodworth, Robin Lyssenko, Scottie McDaniel, Hector Quinonez, Jim Clow, Chien Shih, Ngoc Nguyen, Kathy Nguyen, Nancy Chao, Noelle Hylton (SGHE) and Kari Elliott (note taker).

### **May 9, 2011 – Go Live**

**This will be the last meeting.**

#### **Post Go Live Action:**

1. Acknowledgment letter is now ready – need to certify this week.
2. Stop dual entry this week.
  - Process running well.
  - Some gift entry last week; was successful.
  - Two feeds were done May 16, 2011 in PRODN; was successful.
3. Noelle Hylton (SGHE) will be onsite May 17-18, 2011.
  - Will help with pledges issues.

#### **Payroll Deduction Issues:**

1. Open-end payroll code.
  - Using Calc rule 10; has an end date but end date is not coming over from Advancement.
  - Calc rule 12 is open-ended; not using.
  - Installment form in Advancement has an end date.
  - Need to look at Calc rule 10; should have an end date.
2. Converting existing 200 employees to Advancement from Foundation.
  - Process:
    - Employees who want to donate go to Foundation which creates a record.
    - Copy goes to Payroll; verify signature form – end date is not coming over.
      - Need to make sure end date is the same for Foundation & Payroll.
  - Will need to create new entries for 200 pledges already existing and verify signature for all.