**06/15/16 ULMS Financial Data Subgroup Meeting**

Present: Julie Kowalewski Ward (San Jose); Michael Price (Cal Poly) Denise Gipson-Perry (CSU San Bernardino); Joan Goodwin (CSU San Diego); Margaret (Cal Poly); Jamie (CSU Sacramento); Vickie (CSU Long Beach);

Agenda

Introductions

ULMS Financial Data Subgroup

Define overall charge for the group

Define specific tasks and deadlines

Schedule future meetings

Volunteer minute’s taker –Denise Gipson-Perry

After introductions everyone stated the number of years they have served as Heads of Access Services at their respective universities from 2 years or more. Everyone told of their experiences working in Access Services

The committee was informed of a southern CA Access Services meeting July 28 with more information to come.

Julie stated the areas of focus for this committee

* Clean-up
* System fines structure at the campus level
* System wide CSU loan periods
* Fines – “best practices”

Most CSU campuses have started a “clean-up” of their databases of old fines/fees and of expired patrons before implementation of ULMS system.

Members of this committee apparently CSU San Bernardino is alone in accepting money at the counter for fines/fees. Most other schools fines/fees are paid to the campus Bursar Office

A subgroup of the Financial Committee of volunteers – Jamie, Joan and Vickie to set-up a survey on “Google Document” subj: Dealing with taking money over the counter.

Another subgroup to be set-up to look at system wide “Loan Periods”