

Compilation of PCCD Financial Aid Meetings August to December 2021  
Recordings of meetings are available inside PCCD Teams

PCCD Financial Aid Meeting

August 4, 2021

9:30 – 10:30

**Goals:**

- Collaborate about process
- Discuss policies and procedures
- Ensure we are following all federal/state compliance requirements
- Identify areas of improvement
- Share ideas for enhancing the financial aid process

**Facilitator:**

**Agenda**

1. 2021-2022 Packaging Updates – Richard/Hemanth
  - a. CCPG mass packaging/automation
  - b. The origination will go ahead and be sent to COD and if there are any rejects we can work on that. Will work with Roderick.
2. Other Consultant Updates – Richard/Hemanth/Amanda
3. Campus Logic – Richard
4. BOG Loss Eval for Spring 2021 – Richard/Loan
5. Fraudulent Students – Angie
  - a. Follow-up with Marla about the OIG piece of it
6. FISAP
  - a. Reports from FA analysts
7. IFAP updates – All
8. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process

**Action Items:**

\* Loan and Pell reject report

\*Come up with a solution on how we're going to handle LTHT students for summer

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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## **PCCD Financial Aid Meeting**

**August 19 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

### **Agenda**

1. ACCJC – Janet Faulk
2. Consultant Updates – Richard
  - a. Initial Pell disbursement - Including daily Pell Only Repackaging
  - b. Creation and transmission of Pell disbursement files to COD
  - c. Update on Home Campus mismatch
  - d. SAP status of Unidentified - New and continuing students
  - e. Update on the waiving of checklists and Database Match override of Selective Service Match
  - f. Need to update Verification statuses, Use this query to identify awarded students that failed authorization because verification is not complete: FA\_COLLEGE\_AUTH\_STAT\_NOT\_VERIF
  - g. Campus Logic mod update
  - h. Year End Cutoff - No longer assigning 2021 checklists; 2021 Mass Packaging inactivated. Kent has mentioned there are still some BCC ISIRs coming in for 2021. Can you check why BCC 2020-2021 ISIRs for 08/17/2021 are Unprocessed – load status? Can you check and processed them, please? Should we bring back the ISIR Load for ODD/2021 or just the FAPSAR00 part for each campus?
  - i. Direct Loan processing update

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3. GPA & Enrollment files should be available by/on August 23<sup>rd</sup> – Angie
4. Laney Pell Grant Reconciliation Workgroup - Jennifer
5. HEERF III Awarding Criteria - Ernesto
6. Fraudulent Students – Angie
  - a. Follow-up with Marla about the OIG piece of it
7. FISAP
  - a. Reports from FA analysts
8. IFAP updates – All
9. Open Discussion – All

**Parking Lot Items:**

- iii. Reconciliation Process
- iv. Stale check process

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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**PCCD Financial Aid Meeting**

**August 26, 2021**

**9:30 – 10:30**

**Goals:**

- **Collaborate about process**
- **Discuss policies and procedures**
- **Ensure we are following all federal/state compliance requirements**
- **Identify areas of improvement**

- **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

### **Agenda**

1. Consultant Updates – Richard
  - a. Disbursement Date vs. Refund Date
  - b. Pell disbursed for 2nd refund date
  - c. Direct Loan authorization failure - Informed Borrower Process Not Completed
  - d. Patch 32607779 - UPDATE EFFECTIVE AID YEAR OF INFORMED BORROWING REQUIREMENT FOR AUTHORIZATION/DISBURSEMENT - Patch to be applied and ready for testing in UAT on Monday. The Department of Education published an announcement that, effective with the 2021-2022 Award Year, institutions no longer need to ensure students have completed their ASLA/Informed Borrower information prior to allowing disbursement of Direct Loans.
  - e. Direct Loan authorization failure - Loan interview required
  - f. Request to modify the Shopping Sheet to add:
    - i. Estimated cost for housing and meals
    - ii. Information regarding graduation rates
    - iii. Information regarding the acceptance of transfer credits including military credits
2. AP calculation rules (Pace Completion and Remedial and ESL Coursework) – Jennifer
3. GPA & Enrollment files should be available by/on August 23<sup>rd</sup> – Angie
4. Fed ISIRS not loading properly - Angie
5. FISAP
  - a. Reports from FA analysts
6. IFAP updates – All
7. Open Discussion – All

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**Parking Lot Items:**

- v. Reconciliation Process
- vi. Stale check process

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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**PCCD Financial Aid Meeting**

**September 2, 2021**

**9:30 – 10:30**

**Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

**Agenda**

1. Consultant Updates – Richard, Hemanth, Amanda
  - a. Authorization of loans - Workaround in place to override Informed Borrower issue - Loans no longer failing authorization for this reason. However, some fail due to no loan entrance interview
  - b. 20/21 Aid Year processing update:
    - ISIRs are continued to be loaded
    - No checklists, ATB, NSLDS or email (Thank You email) processing
    - What about awarding, auth/disb, etc
  - c. FISAP - Actual FWS earnings need to replace award amount - Potential for future system improvement

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- d. Update on COD processing/reconciliation
  - i. Is daily Pell origination required?
  - ii. Is the Wednesday Auth/Disb/Group Post and COD disbursement necessary as we only refund once a week on Thursdays. Monday process to remain as is
3. Campus Mismatch - Major Mismatch checklist - Adding phone and email to query
4. ATB - No status if 'None of the above' selected for #26 High School education
5. New role assigned for Counselor 'View Only' for Shopping Sheet
6. Review option to remove the 30-day delay for loan disbursement for Spring for students enrolled in fall
7. Students who have a SAP status of undetermined:
  - a. Query
8. IFAP updates – All
9. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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**PCCD Financial Aid Meeting**

**September 9, 2021**

**9:30 – 10:30**

**Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
-

**Facilitator: Angie**

### **Agenda**

1. Consultant Updates – Richard, Hemanth, Amanda
  - A. Census Date completed 9/7
  - B. Initial disbursement of CAL Grant and SSCG - Refund today
  - C. Initial disbursement is 9/20 for loans (new students) followed by SEOG on 10/11
  - D. FWS awards s/b replaced by actual earned amount – Required for FISAP
  - E. Loan requested the FDP (loan disbursement notification) and FXW (Exit Counseling Weekly) emails be sent. Richard to work with Rodrick to activate them
  - F. COD ISIR files – Review timing requirements

#### **Ongoing Items:**

- A. Richard to respond to the college's request not to have spring loan disbursements delayed 30 days for new students enrolled in fall
  - B. Richard to recommend implementing the delivered SF External Awards functionality to have the CCPG waiver applied to student's award package
  - C. Richard to review the current practice of annual loan entrance interview requirement vs. multi-year
  - D. Richard is working with colleges to determine ATB status for students set to blank as it prevents authorization
  - E. Richard to work with Teresa to modify the Shopping Sheet for Veteran requirements
  - F. Richard to determine why some students have the SAP status of U (Undetermined)
  - G. Richard to update Verification statuses in conjunction with the Campus Logic mod
  - H. Richard to review impact of repackaging being run in simulation
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2. Verification and packaging
  3. Checklist for SAP
  4. IFAP updates – All
  5. Open Discussion – All

#### **Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students

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- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system

### **Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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### **PCCD Financial Aid Meeting**

**September 16, 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

### **Agenda**

#### 1. Consultant Updates

Richard:

- COD Reconciliation update
- Query sent to colleges identifying 782 enrolled students not yet packaged because their verification status is 'Required'. However, their V1 checklist has been waived
- Query sent to college identifying 30 new students with current enrollment, but their SAP status is 'Undetermined' preventing packaging

Hemanth:

- FISAP Reports
2. MIS Reporting to State – Steven Chan
  3. Audit Deliverables – Marla



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4. 22-23 FA Set-up – Jennifer
5. Cut off time for packaging on Wednesdays – Angie
6. SAP checklist items – Angie
7. Enrollment is not equal to FA load – Angie
8. IFAP updates – All
9. Open Discussion – All

### **Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system

### **Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard

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## **PCCD Financial Aid Meeting**

**September 23, 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
-

**Facilitator: Angie**

## **Agenda**

1. Consultant Updates
  
2. Finance Updates – Marla
3. MIS Reporting to State – Steven Chan
  - a. Paper Apps not in PS but got disbursed
  - b. Disbursements with missing code(s) in the Aggregate Area or Report Code in PS.
  - c. Validate PELL Grant and CCPG headcounts, award counts and total award amounts.
  
4. Audit Deliverables – Marla
  
5. FISAP Reporting – Angie
  
6. Enrollment is not equal to FA load – Angie
  
7. HEERF II Awarding – Angie
  
8. HEERF III Awarding – Angie
  
9. IFAP updates – All
  
10. Open Discussion – All

### **Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system

Action Items:

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\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Ernesto, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Phasasha, Richard, Steven

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## **PCCD Financial Aid Meeting**

**September 30, 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

### **Agenda**

1. MIS Reporting to State – Steven Chan
2. Consultant Updates
3. FISAP
  - a. Working meeting to go over queries
4. Queries to support awarding additional SEOG
5. Transmission Meeting - Angie
6. Finance Updates – Marla
7. Audit Deliverables – Marla
  
8. IFAP updates – All
  
9. Open Discussion – All

### **Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement

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- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance

### Action Items:

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

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## PCCD Financial Aid Meeting

October 7, 2021

9:30 – 10:30

### Goals:

- Collaborate about process
  - Discuss policies and procedures
  - Ensure we are following all federal/state compliance requirements
  - Identify areas of improvement
  - Share ideas for enhancing the financial aid process
- 

Facilitator: Angie

### Agenda

1. MIS Reporting to State – Steven Chan
  - a. Review list of paper apps
  - b. Completing the FA app spreadsheet
2. Consultant Updates
  - a. Richard
    - i. Loan Item Types with 'LY' in description
    - ii. COD reconciliation workgroup
    - iii. CPG question
  - b. Hemanth
    - i. FISAP
3. Finance Updates - Marla
4. Emergency Grant - Angie
5. Audit Deliverables – Marla
6. IFAP updates – All
7. Open Discussion – All

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**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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**PCCD Financial Aid Meeting**

**October 21, 2021**

**9:30 – 10:30**

**Goals:**

- **Collaborate about process**
- **Discuss policies and procedures**
- **Ensure we are following all federal/state compliance requirements**
- **Identify areas of improvement**
- **Share ideas for enhancing the financial aid process**

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**Facilitator: Angie**

**Agenda**

1. MIS Reporting to State – Steven Chan
2. Consultant Updates
  - a. Richard
  - b. Hemanth
  - c. Amanda
3. Finance Updates – Marla
4. Emergency Grant - Angie
5. Audit Deliverables – Momo

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a. New Title IV request

Key	Summary
AIW-1097982	SFA (Merritt) - R2T4 sample selections and supporting documentation
AIW-1097959	SFA (Alameda) - R2T4 sample selections and supporting documentation
AIW-1097719	SFA (Berkeley) - R2T4 sample selections and supporting documentation
AIW-1097598	SFA (Laney) - R2T4 sample selections and supporting documentation

6. IFAP updates – All

7. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance
- viii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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## **PCCD Financial Aid Meeting**

**October 28, 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
  - **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator: Angie**

### **Agenda**

1. MIS Reporting to State – Steven Chan
2. Consultant Updates

Richard

- a. Review proposal to remove prior year checklists from student's To-Do lists
- b. Review proposal for District FA to monitor and report on DL and Pell processing validation failures and COD rejects
- c. Discuss findings of Peter Nguyen's concern regarding checklist F22V5 not assigned - This impacts many students
- d. Discuss plans for the new 22/23 aid year system setup
3. Finance Updates – Marla
  - a. Audit deliverables
  - b. Awarding of 2021 fraud students
  - c. Fraud Workshop Part 2
  - d. FA Core Business processes
  - e. FISAP query check-in
4. Emergency Grant - Angie
  - a. Item type set-up
5. Bank Mobile Profile Creation – Jennifer
6. SSARCC – Patricia
7. IFAP updates – All
8. Open Discussion – All

### **Parking Lot Items:**

- i. Reconciliation Process

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- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance
- viii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

### **Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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## **PCCD Financial Aid Meeting**

**November 4, 2021**

**9:30 – 10:30**

### **Goals:**

- **Collaborate about process**
- **Discuss policies and procedures**
- **Ensure we are following all federal/state compliance requirements**
- **Identify areas of improvement**
- **Share ideas for enhancing the financial aid process**

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### **Facilitator:**

#### **Agenda**

1. MIS Reporting to State – Steven Chan
2. Consultant Updates

Richard

- a. COD Reconciliation - Spreadsheet listing most of the failure reasons has been completed
- b. Prior year checklists - Should be removed by next week - The status will be changed to Cancelled
- c. V5 Checklist - Students selected for V5 should receive the necessary tasks of high school completion and statement of educational purpose in CL



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- d. Progress update on setup for the new aid year 22/23
  - i. Hemanth
  - ii. Amanda
3. Finance Updates – Marla
  - a.
4. Dream Act Incentive Grant - Patricia
5. CCPG Issues – Angie/Jackie
6. IFAP updates – All
7. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance
- viii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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**PCCD Financial Aid Meeting**

**November 18, 2021**

**9:30 – 10:30**

**Goals:**

- **Collaborate about process**

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- **Discuss policies and procedures**
  - **Ensure we are following all federal/state compliance requirements**
  - **Identify areas of improvement**
  - **Share ideas for enhancing the financial aid process**
- 

**Facilitator:**

### **Agenda**

1. MIS Reporting to State – Steven Chan
2. Consultant Updates

Richard

- Merritt College COD Reconciliation efforts
- Decision request regarding assigning the V5 checklist -  
Query PCCFA\_VERIFICATION\_3CE\_SAMPLE lists 1289 students
- Status of assignment of the User Edit Message - W01266 - This student has been included in an alert file. The student's financial Aid awards should be reviewed for validity before disbursement
- Query revision to identify COA students eligible for FWS
- Upcoming Auth/Disb of SEA Grant

Hemanth

Amanda

3. Finance Updates – Marla
4. Fraud Students – Angie
5. 2022-2023 COA - Angie
  
6. New Aid Year Set-up – Jennifer/Patty/Angie
  
7. IFAP updates – All
  
8. Open Discussion – All

### **Parking Lot Items:**

- ix. Reconciliation Process
  - i. Stale check process
  - ii. Changing the language on the website for disbursement so it's clearer for students
  - iii. Consortium agreement
  - iv. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
  - v. Policy change for loan entrance changes in the system
  - vi. Policy about back dating class additions and financial aid compliance

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- vii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

### Action Items:

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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### PCCD Financial Aid Meeting

December 3, 2021

- Collaborate about process
  - Discuss policies and procedures
  - Ensure we are following all federal/state compliance requirements
  - Identify areas of improvement
  - Share ideas for enhancing the financial aid process
- 

### Facilitator:

#### Agenda

1. MIS Reporting to State – Steven Chan
2. Consultant Updates

Richard

- a. Update on 22/23 ISIR load testing in UAT and timeline for PRD
- b. New Aid Year timeline
  - Resolve Campus Logic interface/mod - ASAP
  - Load 22/23 ISIRs in PRD – 12/10/21- Includes ability to make ISIR corrections and send to CPS
  - CAL ISIR setup/testing - TBD
  - Assign checklists 12/17/21
  - FA Forms updated on FA Webpage 12/20/21 – 22/23 FA Forms V1, V4, and V5
  - Send 'Thank You' email 12/21/21
  - 22/23 'Refund' (as opposed to disbursement) dates and Cost of Attendance Budgets required from colleges – Target date 1/21/22
  - Campus' 22/23 allocations for FWS, SEOG, and any other grants allocations - Target date 1/21/22
  - Load 22/23 Pell Grant Table into PRD
  - Mass Package Pell & SEOG – Target date 4/1/22 (Set up/Testing done in Feb)
  - Send award email – 4/1/22

Amanda

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3. Finance Updates – Marla
  - a. Audit
  
4. 2022-2023 COA
5. New Aid Year Set-up – Jennifer/Patty/Angie
  
6. IFAP updates – All
  
7. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance
- viii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

Action Items:

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven

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**PCCD Financial Aid Meeting**

**December 9, 2021**

- **Collaborate about process**
- **Discuss policies and procedures**
- **Ensure we are following all federal/state compliance requirements**
- **Identify areas of improvement**
- **Share ideas for enhancing the financial aid process**

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**Facilitator:**

**Agenda**

Compilation of PCCD Financial Aid Meetings August to December 2021  
Recordings of meetings are available inside PCCD Teams

1. Consultant Updates

Richard

- a. Next COD reconciliation meeting Monday 12/13 @ 9:30am. Will likely be attended by Dr. Boyd from DOE. Jennifer/Loan/Richard to prepare meeting agenda
- b. Upcoming Campus Logic mod review meeting – Thursday 12/16 @ 10:30 – All are welcome
- c. New 22/23 ISIRs will be loaded in UAT for testing this week
- d. Richard to cancel 20/21 initiated checklist for ineligible major and major mismatch. This is being done so the 20/21 checklist does not show on a student's 'To-Do' list

2. FISAP Report updates

3. 2022-2023 ISIR Loads, thank you letters, Checklist assignments – Angie

4. Finance Updates – Marla

5. EW calculation in system for SAP

6. New Aid Year Set-up – Jennifer/Patty/Angie

7. IFAP updates – All

8. Open Discussion – All

**Parking Lot Items:**

- i. Reconciliation Process
- ii. Stale check process
- iii. Changing the language on the website for disbursement so it's clearer for students
- iv. Consortium agreement
- v. Major/FAFSA mismatch: revisit how to refine this process to make it easier for the student and campus [Include Roderick in the discussion]
- vi. Policy change for loan entrance changes in the system
- vii. Policy about back dating class additions and financial aid compliance
- viii. MIS monthly reconciliation [report at each campus level to pull for each award and do comparisons]

**Action Items:**

\*Come up with a solution on how we're going to handle LTHT students for summer

\* Richard will create a timeline for authorization and disb and cut off date\*

In Attendance: Amanda, Angie, Hemanth, Jennifer, Joseph, Loan, Marla, MoMo, Patricia, Phasasha, Richard, Steven