

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

PCCD Financial Aid Meeting
January 6, 2022
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: Patricia Mendoza

Agenda

A. Consultant Updates – Richard/Hemanth

o Options to expand/standardize communications with students regarding registration in StudentForms

- § Quick fix - Enhance comment code on 105CL checklist that states:
CampusLogic Forms require completion
- § Use of Comm Gen to send instructions to register with StudentForms

B. Internal Control Reference Materials – MoMo

- o GAO Green Book
- o COSO Cube

C. MIS- Steven Chan

- o MIS FA 2020-21 Data (PELL and CCPG only) Re-submission for SCFF PCCD
deadline 1/7/22 and State deadline 1/14/22
- o MIS FA 2021-22 Data Errors and resolution status
- o MIS FA Monthly reconciliation and error resolution on-going

D. Finance Updates – Marla

E. New Aid Year Set-up – Jennifer/Patty

F. 2022-2023 Chelist – Jennifer/Patty

G. IFAP updates – All

H. 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

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* 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, Steve

Facilitator: Jennifer Ma

Agenda

January 13, 2022

- A. MIS Data – Steve
 - o Review Error Report 21-22 on Power BI on a monthly/term basis
- B. Consultant Updates – Richard/Hemanth
- C. Finance Updates – Marla
- D. New Aid Year Set-up – Jennifer/Patty
 - o Cost of Attendance
 - o Disbursement Dates
- E. CPG Evaluation for Spring 2022 – Jennifer
- F. SAP Evaluation for Spring 2022 – Jennifer
- G. Emergency Assistance Grant - Amy
- H. IFAP updates – All
- I. Open Discussion – All

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1/27/2022

Facilitator: Patricia Mendoza

A. MIS Data – Steve

B. Consultant Updates – Richard/Hemanth

- o New Aid Year 22/23 timeline - Revised
- o Complete Campus Logic mod – Specs submitted 1/7
- o Confirm new year setup in UAT - By 2/7
- o Migrate new year setup to PRD – By 2/9
- o Load 22/23 Pell Grant Table into PRD
- o Begin loading 22/23 ISIRs in PRD – By 2/14- Includes ability to make ISIR corrections and send to CPS
- o CAL ISIR setup/testing
- o Assign checklists – By 2/15
- o FA Forms updated on FA Webpage – 22/23 FA Forms V1, V4, and V5 (Contact info for Jennifer, Patty, Jackie), AY 21/22 CCPG App, AY 22/23 CCPG App, AY 22/23 CCPG Income Standard, AY 22/23 CCPG Petition Form
- o Send ‘Thank You’ email – By 2/18
- o 22/23 ‘Refund’ (as opposed to disbursement) dates and Cost of Attendance Budgets required from colleges – Target date 2/21/22
- o Campus’ 22/23 allocations for FWS, SEOG, and any other grants allocations - Target date 2/21/22
- o Mass Package Pell & SEOG – Target date 4/1/22
- o Send award email – Target date 4/1/22

C. Finance Updates – Marla

- o Recent Audit Requests
 - i. Proposed deliverable February 4th
 - ii. OMB 2021 Compliance Requirement
- o Recruitment update for District FA Director
- o Huron Support update
- o Development of FA budget reports

D. IFAP updates – All

E. Open Discussion – All

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Agenda

2/03/2022

Facilitator: Patricia Mendoza

- A. Status of Missing Information on FA ITEM for AY 2022 – Steve
- B. Consultant Updates – Richard/Hemanth
 - o New Aid Year 22/23 timeline - Revised
 - o Complete Campus Logic mod – Specs submitted 1/7
 - o Confirm new year setup in UAT - By 2/7
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- o Mass Package Pell & SEOG – Target date 4/1/22
- o Send award email – Target date 4/1/22
- C. Finance Updates – Marla
- D. Cal Grant / SSCG Disbursement Date Discussion – Dave
- E. Loan Disbursement Codes/Plans (New Borrower versus Continuing) - Jennifer
- F. IFAP updates – All
- G. Open Discussion – All

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Facilitator: Patricia Mendoza

Zoom: <https://cccconfer.zoom.us/j/97296613801>

Agenda

2/10/2022

- A. 2 minutes meditation – [click here](#)
- B. Consultant Updates – Richard/Hemanth
- C. Finance Updates – Marla ([Higher Education User Group Conference \(HEUG\)](#))
- D. Dream Act fee waiver – Patty
- E. Consortium Agreement – Patty
- F. IFAP updates – All

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G. Open Discussion – All

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Facilitator: Jennifer Ma

**Agenda
3/3/2022**

- A. AY CAL ISIR testing in UAT – Amanda
- B. Consultant Updates – Richard
- C. Finance Updates – Marla
- D. Change FA Disbursement weekly schedule – Dave
- E. Loan Disbursements - Jennifer
 - o Revisit Loan Split Plan/Codes Matrix
 - o Students passing authorization but failing disbursement.
- F. Failed Pell Mass Packaging – Jennifer
- G. CCPG – Patty
- H. IFAP updates – All
- I. Open Discussion – All

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Agenda

4/7/2022

- A. MIS Report Code Update – Steven
 - o MIS Data Element (SG23)
 - o Can FA capture these new data in any capacity when students apply for FA?
- B. Cash Management – MoMo
 - o Activities that impact SFA
- C. HEERF Awarding – Richard
 - o Merritt HEERF processing – Group Posting on HOLD
 - o Any upcoming HEERF awarding?
 - o Complete final Cost of Attendance worksheet with revised out of state tuition
 - o Update on new aid year setup
 - o UAT refresh scheduled for April 20th
 - o Target date for Fall/Spring Mass Packaging and Award Letter = May 1st
 - o Looking ahead - Spring term ends 5/27/22. Summer term begins 6-13-22. Involves Spring SAP, summer packaging and Pell re-packaging (Question 'Locked' Pell)
 - o Review SEOG Auto Packaging amount – COA has increased the max from \$300 to \$500/term, \$1000/aid year – Do other colleges want to change?
 - o Per Peralta CCD web developer team please do not use the website <https://web.peralta.edu> because they are not updating the website since it is no longer being supported. Please start using this website <https://explore.peralta.edu>. This website is where all the updates will be made. Note: when you are in the

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home page, scroll down to the bottom of the page and click on Financial Aid. You will see a Menu bar at the right side of the page

- D. District Updates – Marla
 - o DOE stale check project – update for 2020
 - o Call for HEERF Students Award Files
- E. LTHT files - Patty
- F. Open Discussion – All

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- ix. Mass Packaging CCPG based on CAL ISIRs
- x. FA Retreat – Districtwide

Action Items:

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

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Facilitator: Ken Lira

Teams: [Click here to join the meeting](#)

Agenda

4/21/2022

- A. FA Processing – Richard
 - o Submit college enrollment files to CSAC
 - o Pell Grant LTHT COA issue follow-up
 - o 22-23 packaging status

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- Campus Logic update
- Pell Grant originations issue (Laney College)
- B. Stale Check Updates
 - BankMobile changes (Marla & Roderick)
 - Procedures (Ken)
- C. Open Discussion – All
- D. Private loan and scholarship check process w/ FA directors (Momo & FA directors)

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Agenda 4/28/2022

- A. Gift cards follow-up (Momo)
- B. 19-20 COD downward adjustments for stale dated checks
- C. Financial Aid Processing Updates (Richard)
- D. CCPG Student Issues Update (Marla)
- E. Stale dated check processing update (Ken, Dave & Margie)
- F. Students not packaged Pell Grant (Jennifer)
 - COA runs PS Query Name: PCCD_ELIGIBLE_NOT_AWARDED

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- Laney report PS Query: PCCD_FA_CHKLIST_BY_SCHOOL (can include Awarded Pell (Y/N), award amount, disbursed amount, EFC and term enrollment)
- G. HEERF III Annual Report
- H. Mass Packaging Rules and Various Packaging ID/Attendance Patterns (this is related to the non-selected for verification students who failed mass packaging).
 - Fall-Spring
 - FA Only
 - SP Only
 - SU Only
- I. Parent Plus Loan (Patty)
- I. Parking Lot Items
- J. Action Items
- K. Open Discussion – All

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- x. FA Retreat – Districtwide
- xi. Private loan and scholarship check process

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Facilitator: Ken Lira

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Agenda 5/5/2022

- A. 19-20 COD downward adjustments follow-up
- B. HEERF Year 2 Annual Report update
- C. Financial Aid Processing Updates (Richard)
- D. CCPG Student Issues Update (Marla)

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- E. Huron update (Jennifer & Ken)
- F. Summer 2022 budget and awarding update (Dave & Richard)
- G. SAP Disq/Probation missing notifications for Spring 2022
- H. Pell Grants not packaged or disbursed update (Ken)
 - CIP code
 - High school completion & citizenship
 - Missing info (e.g. enrollment start date)
- I. Parking Lot Items
- J. Action Items
- K. Open Discussion – All

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Facilitator: Ken Lira

Teams: [Click here to join the meeting](#)

Agenda 5/26/2022

- A. Action Items from prior meeting
- B. 19-20 COD downward adjustments
- C. Financial aid processing updates (Richard)
- D. CCPG error cleanup
- E. 21-22 annual audit

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- F. Huron update (Jennifer & Ken)
 - COD reconciliations and transmissions w/Laney
 - Pell issues (e.g. LTHT, ATB, citizenship, CIP, missing enrollment data)
- G. Regulatory updates
- H. Parking Lot Items
- I. Open Discussion – All

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Facilitator: Ken Lira

Teams: [Click here to join the meeting](#)

Agenda 6/16/2022

- A. 19-20 COD downward adjustments
- B. Financial aid processing/Edgerock updates (Richard)
- C. CCPG student issue update
- D. Huron updates (Jennifer)
- E. Summer processing
- F. SAP processing
- G. Automatic refunds to students w/ CCPG's
- H. Pell/CCPG and SCFF
- I. Open Discussion – All

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Facilitator: Ken Lira

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Agenda 7/21/2022

- A. DOE updates
- B. Edgerock updates including 22-23 FA processing (Richard)
- C. Huron updates (Ken)
- D. FA Systems Tech Analyst updates (Ken)
- E. Audit (Ken and Momo)
 - Update on annual audit
 - Review prior year audit findings and preparing for 22-23
- F. FISAP reporting
- G. CCPG student issue update
- H. Parking Lot Items
- I. Open Discussion – All

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