

Financial Aid Directors Meetings May 21 – Aug 22

FA Director's Meeting 5-6-21

Topic Status:

1. New Year Set-up

Where are we with this process?

- The core setup is currently being established in the test database (UAT – User Acceptance Testing).
- UAT has the latest system software updates applied (PUM 20)
- The top priority is the setup to support ISIR loads, checklist assignment and related communications to begin the verification process with Campus Logic

What information do you need from the colleges to complete this process?

- The Cost of Attendance budgets and certain key dates have been requested

What is the timeline to get this set-up?

- The best case is the week of May 17th to begin loading ISIRs

2. SAP run

3. CCPG Waivers (2021-2022)

4. Award Automation

FA Director's Meeting – Agenda Items 9-9-21

Updates:

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

Ongoing Items:

1. Richard to respond to the college's request not to have spring loan disbursements delayed 30 days for new students enrolled in fall
2. Richard to recommend implementing the delivered SF External Awards functionality to have the CCPG waiver applied to student's award package
3. Richard to review the current practice of annual loan entrance interview requirement vs. multi-year

Financial Aid Directors Meetings May 21 – Aug 22

4. Richard is working with colleges to determine ATB status for students set to blank as it prevents authorization
5. Richard to work with Teresa to modify the Shopping Sheet for Veteran requirements
6. Richard to determine why some students have the SAP status of U (Undetermined)
7. Richard to update Verification statuses in conjunction with the Campus Logic mod
8. Richard to review impact of repackaging being run in simulation

Director's Meeting 9-9-21

Action items for Richard:

1. Provide query name that lists new students with SAP status 'Undetermined'. The query is FA_STDNT_AID_ATRBT_SAP_U
2. Publish timetable of FA processing jobs with emphasis on key deadlines required to meet Thursday's refund processing
3. Add ATB checklist to students not answering or selecting 'None of the above' for FAFSA question #22 regarding high school education. Colleges will be asked to create checklist comments
4. Review SAP processing where new students are defaulted to Meets. Why do some remain 'Undetermined'?
5. It is confirmed – The selection query for Mass Packaging has been modified to include the Verification Flag (Verification Status) of either N (Not Required) or C (ED Verification Complete). The criteria for the Verification Status (Verification Selection Indicator) to be N (Not Selected) has been removed
6. Note that campus FA staff do not/should not change a student's 'Review Status'. When a student meets the requirements to be selected for mass packaging, the process updates the review status to complete and marks the student as ready for packaging
7. Create a query to list students with the V1 checklist 'Waived' and their Verification Flag is R (Required). FA staff can then update the Verification Flag to Not Required or Completed
8. Review Jackie's email regarding students not having certain SAP checklists
9. Review Loan's email regarding student's enrollment not equal to their FA Load
10. Review 1st, then add back the FDP (loan disbursement notification) and FXW (Exit Counseling Weekly) emails to the ISIR load Job

Agenda Item for 9/30/21

[Yesterday 3:22 PM] Hemanth Kumar

you can refer and update as needed

[Yesterday 11:59 PM] Marla Williams-Powell

Financial Aid Directors Meetings May 21 – Aug 22

Hello Folks, Let's discuss this for the near future - fraudulent students have a flag on the their accounts of "APP", once we stop paying for 20-21, how can we clean up the data for those students who have not received refunds (this may be a collaborative but necessary effort).

[12:02 AM] Richard Davis

It will be added to the mornings topics

Marla – This week was extraordinary with ongoing system processing failures related to awarding.

The awarding for fall/spring and issuance of award notification emails depend on these processes.

The failures have been shared with IT along with the resulting error messages which are the same for all.

A workaround of rerunning the failed process worked in most cases except the final Mass Packaging step.

Ticket #133335 has been filed with the Help Desk.

Takeaways following a productive COD Reconciliation meeting:

1. We can now identify and understand reasons for failed Pell disbursement validations
2. The primary information source is the Message Log (one for each college) from the PELLOUT process. Records that fail validation are not sent to COD
3. No ATB – This is solved. We now assign a checklist that will prevent packaging. For existing failures, colleges can assign the ATB code if warranted
4. No Citizenship – This is solved. It came to light that colleges are manually populating citizenship status in the Pell and Loan records – A big waste of time. Pop updates will be scheduled to batch update citizenship. Existing failures have been corrected
5. Invalid Value, Missing Value, Missing Credential Level XREF setup and Incorrect CIP Code – These failures result from students changed to ineligible majors which explains why there is not a Credential Level setup. However, the funds have been disbursed
6. System enhancements discussed – Have checklist assigned when major changed. Ensure checklists for major mismatch and ineligible major re assigned to all applicable terms

Facilitator: Patricia Mendoza

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

Financial Directors Meeting Agenda

Financial Aid Directors Meetings May 21 – Aug 22

4/22/2022

- Pell (and Cal Grant) LEU notifications (Patty)
 - Review notifications
 - Cal Grant/SSCG disbursements follow-up (Jennifer)
 - Create a policy regarding census date
 - Suspense Files
 - Discuss stale dated check procedures, recommend changes and next steps
 - Other procedures, where kept
 - Campus Logic update
 - BankMobile update (call this week and report request(s))
 - Prior debts fees
 - Private scholarships/loans process follow-up
 - Staff retreat
 - FA Project List follow-up
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Financial Directors Meeting Agenda 4/29/22

- 22-23 budget review (sample provided by Richard)
 - 19-20 COD cleanup follow-up
 - Cal Grant/SSCG disbursements follow-up and next steps (get data)
 - Giftcards follow-up next steps
 - Staledated check procedures and BankMobile follow-up
 - Campus Logic follow-up
 - FA Sharepoint site updates
 - HEERF Reporting update
 - CCPG assignment follow-up: are they being applied to student accounts daily? Ok to assign CCPG's and avoid issue of not applying to non-eligible students?
 - Review Project List
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PCCD FA Directors Meeting Agenda 5/13/2022

1. Review [4/29/22](#) minutes
2. CCPG error and query CCPG_LOAD_ERROR_SPRING_2022
3. HEERF Annual Report
 - Report debrief
 - Procedures
 - Audit preparation (quarterly and annual reports)
4. DOE follow-up
 - 19-20 cleanup finished by 5/20/22 (return funds; no reissues)
 - SEOG returns will also need to be rereported on FISAP
 - Pre-19-20 return of funds status
5. BankMobile follow-up

Financial Aid Directors Meetings May 21 – Aug 22

- Notifying students of disbursement preferences to reduce returns
 - Training coordination (online option only)
 - Title IV indicator in disbursement file, in addition to Source (e.g. fund name)
6. MIS Report
 - Discussion w/ Steven Chan at 5/26/22 meeting
 - Item type cleanup
 - Ongoing reconciliation
 - Paper CCPG's for MIS report (current process & meeting with Roderick and Steven)
 7. SAP notifications
 - 665 students for Spring 2022
 - Discrepancies between Dave and Richard's queries
 - FA directors to compare queries to ensure next SAP job accurate and complete
 8. Huron updates (Jennifer & Ken)
 9. Edgerock
 - Timeline on LTHT Pell fix proposed by Huron
 - Impromptu meeting flexibility
 10. PeopleSoft upgrades
 - PUM 9.2.023 to 025 upgrade schedule & YRP
 - PUM 26 schedule for FISAP
 - Coordinating future upgrades w/ FA processing calendar
 11. Summer Processing
 12. Review and comment on DOE R2T4 audit response
 13. FISAP report preparations including 21-22 closeout including PS PUM 26 upgrade
 14. Formation of [FA teams and workgroups](#)
 15. [Audit issues](#) follow-up
 16. Monthly reconciliation notifications
 17. Parking Lot items follow-up
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PCCD FA Directors Meeting Agenda 5/20/2022

1. Review 5/13/22 minutes
2. 19-20 cleanup follow-up
3. Subsequent ISIR processing
 - Look at ISIR data load parameters
 - Assigned FA staff to work report weekly before disbursement
 - Additional assistance needed from Richard or Roderick for new query
4. 22-23 verification changes

Financial Aid Directors Meetings May 21 – Aug 22

- Richard requested Jackie provide what checklists not to assign for new ISIRs
 - Confirm if the same checklists need to be waived for existing students.
5. Edgerock
 - Timeline on LTHT Pell fix proposed by Huron
 - Upcoming project requests of Richard
 6. PeopleSoft upgrades
 - PUM 9.2.023 to 025 upgrade schedule & YRP
 - PUM 26 schedule for FISAP
 - Coordinating future upgrades w/ FA processing calendar
 7. Summer Processing (e.g. FA term assignment, YRP)
 8. Review and comment on DOE R2T4 audit response
 9. FISAP report preparations including 21-22 closeout including PS PUM 26 upgrade
 10. Formation of [FA teams and workgroups](#)
 11. [Audit issues](#) follow-up
 12. Monthly reconciliation notifications
 13. Parking Lot items follow-up
 14. CCPG error and query follow-up
 15. BankMobile follow-up
 - Training coordination (online option only)
 - File updates (Title IV and Source data included in disbursement file)
 16. MIS Report follow-up
 17. SAP notifications follow-up and query comparison
 18. Huron updates (Jennifer & Ken)
 19. Less-than half-time policy (Dave) to address fix needed between Richard and Tim.
 20. Pell processing setup in PeopleSoft per email comments from Richard and Tim
 21. Top 10 queries (query compilation and remaining needs, including management reports such as performance tracking)
 22. Discuss improving Pell #'s
 23. Systems access issues (still persisting)?

PCCD FA Directors Meeting Agenda 5/27/2022

1. Review 5/20/22 action items
2. Summer CCPG assignment
 - Needed before 1st Pell Grant disbursement Week of June 6th

Financial Aid Directors Meetings May 21 – Aug 22

- Roderick needs selection query to apply equation variable to have fees waived
- 3. CCPG assignment process discussion w/ Roderick
 - FAFSA
 - Dream Act app
 - Online CCPG app
- 4. CIP updates
- 5. Pell disbursement issues, processing status and SCFF
 - Not awarded
 - Not disbursed
- 6. Meeting schedule changes
 - Ken out of office
 - Upcoming 4/10 schedule
 - Next district-wide FA meeting
 - Initial subsequent ISIR processing meeting (invite IT)
- 7. 22-23 verification changes implementation
 - Instructions to Richard
 - District website updates
 - Campus Logic info
- 8. SAP
 - PS appeal dates (Dave)
 - Appeal form access wording (cf. Jackie's email)
 - Notifications
 - Query comparison
 - Next SAP policy meeting
- 9. Laserfiche demo
- 10. Review and comment on [DOE R2T4 audit response](#)

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- 11. FISAP report preparations including 21-22 closeout
 - 12. [Identification of FA teams/workgroups](#) and [analysis of job descriptions for assignment to teams/workgroups](#)
 - 13. [Audit issues](#) follow-up
 - 14. Monthly reconciliation notifications
 - 15. BankMobile follow-up
 - Training coordination (online option only)
 - File updates (Title IV and Source data included in disbursement file)
 - 16. MIS Report follow-up (review [procedures](#))
 - 17. End of year processing

Financial Aid Directors Meetings May 21 – Aug 22

1. Review 5/27/22 notes
2. 19-20 cleanup follow-up
 - Discuss reports to use for prior year cleanup
3. COD files not exported or loaded
 - Roderick indicated (2) issues: students with an outbound file with no response file loaded back into PS and students for whom an outbound file was not sent.
 - Roderick developed a report; so did Tim Krug PCCD_COD_FILES_NO_RESPONSE_1. Which one to use?
 - Any other issues to discuss/document?
4. 22-23 verification setup
5. CCPG processing
 - Evaluations & notifications
 - Assignment
6. Summer processing
 - Zeroed out Spring 2022 awards
7. SAP processing
8. Huron updates (Jennifer & Ken)
9. DOE R2T4 audit response
10. Formation of [FA teams and workgroups](#)
11. [Audit issues](#) follow-up
12. Monthly reconciliation notifications
13. Parking Lot follow-up (items noted on District FA Meeting agendas)
14. BankMobile follow-up
 - Training coordination (online option only)
 - File updates (Title IV and Source data included in disbursement file)
15. MIS Report follow-up
16. Year-end processing
17. Review batch scheduled jobs and evaluate for additions and other changes
18. Overaward report
19. Upcoming deadlines
20. Good of the order

PCCD FA Directors Meeting Agenda 6/30/22

1. 6/23/22 meeting recording [here](#)
2. 20-21 & 21-22 Title IV cleanup
3. SEOG year-end packaging/disbursement
4. District annual audit
5. HEERF quarterly report
6. Huron updates

Financial Aid Directors Meetings May 21 – Aug 22

- Contract
- Current work and upcoming work across district
- 7. FA technical analyst recruitment
- 8. [PUM 25 testing](#)
- 9. CCPG Spring 2022 evaluations
- 10. 22-23 processing launch
- 11. [Audit issues](#) follow-up
- 12. Monthly reconciliation notifications
- 13. Training
 - BankMobile (online option only)
 - Priority of other training needs
- 14. Upcoming deadlines
- 15. Good of the order

PCCD FA Directors Meeting Agenda 7/14/22

1. DOE follow-up
 - 19-20 closeout
 - 20-21 cleanup documentation needed like 19-20
 - 21-22 status
2. Audit
 - Admin level access and which users to assign
 - Preferred meeting times for testing, interviews and follow-up (can have some overlap)
 - Turnaround time between lists and samples
 - District FA role after 7/21
 - Confirm moving to separate out views by college
 - NSLDS proposed meeting
 - 3. District auditor's attendance request
 - 4. FA master calendar (now on SharePoint)
 - 5. [Audit issues](#) follow-up and prepping for 22-23 (e.g. monthly reconciliation notifications)
 - 6. Weekly FA directors meetings August thru May
 - 7. FA technical analyst recruitment follow-up
 - 8. CCPG Spring 2022 evaluations and notifications
 - 9. Huron contract statement of work review and any additional items for inclusion
 - 10. SEOG awarding discussion
 - 11. Paper forms being used by FA offices
 - 12. Major changes
- Current practice
- Recommended changes (e.g. lock-in for year (Fall/Spring/Summer))
 13. R2T4 process (review SMCCD process)
 14. 22-23 processing status
 15. 22-23 training with Tim Krug (recommended items)

Financial Aid Directors Meetings May 21 – Aug 22

16. Support requests (interim)
17. Direct Loans
 - Entrance counseling and checklist setup
- Origination setup for new year (Jennifer)
18. Promise (AB19 & AB2) processing
19. Training
 - Recommendations for 22/23 FA processing w/ Huron (e.g. Subsequent ISIRs, clearing students citizenship flags, checklist requirements, etc.)
 - BankMobile
 - Other (TBD)
20. Upcoming deadlines
21. Open discussion

PCCD FA Directors Meeting Agenda 7/28/22

1. ACCJC follow-up report
2. Audit status
3. Huron training
4. DOE Title IV cleanup status
 - 20-21
 - 21-22
 - 2022 goal
5. 22-23 processing update
 - Review mass packaging results in Simulation and get back to Richard
 - No manual packaging until after mass packaging
6. Oracle customizations
7. Campus Logic follow-up
8. MIS report follow-up
9. [Audit issues](#) follow-up
10. Monthly reconciliation notifications
11. LTHT cost of attendance and awarding (Dave)
12. CCPG checklist
13. Pell Grant disbursements
 - Schedule (25-25-50)
 - Disbursing before start of term
 - Late starting class report and PRD/freeze date
14. Subsequent ISIR processing
15. Updated P&P manual
16. DL entrance counseling and checklist setup (overall DL process)
17. CVC implementation
18. Promise Program
19. Ongoing training

Financial Aid Directors Meetings May 21 – Aug 22

- BankMobile
- Campus Logic
- Other (TBD)

20. Upcoming deadlines

21. Open discussion

In-Process Items:

- Subsequent ISIR processing
- Where are manual overrides being performed?

PCCD FA Directors Meeting Agenda 8/12/22

1. FA queries
2. Bank Mobile record file layout requested changes follow-up
3. PCCD consortium agreement
4. Campus Logic admin access follow-up
5. DOE Title IV cleanup status
 - 20-21
 - 21-22
 - 2022 goal
6. Late starting class report and 2nd Pell Grant disbursement
7. Campus Logic follow-up
8. MIS report follow-up
9. [Audit issues](#) follow-up
10. Monthly reconciliation notifications
11. DL entrance counseling and checklist setup (overall DL process)
12. CVC implementation
13. Promise Program
14. Ongoing training
 - BankMobile
 - Campus Logic
 - Other (TBD)
15. Upcoming deadlines
16. Open discussion