FA Processing Tuesday 4-26-22
Here's What's Going On:

1.	DONE - The mass packaging for the Emergency FA Assistance Grant is complete. All 120 listed COA students have been disbursed $465 for the spring term totaling $55,440 in time for Thursday's refunding – Very clean data

2.	IN PROCESS -The external award processing for the Laney ASLC Award for Spring 2022 has been confirmed and Roderick is moving to stage the awards. Once staged, Richard will disburse the funds – Anticipated completion today will allow for processing in this week's refunding – Roderick to update on staging progress

3.	NEW - Dave has requested processing of the CCPG waiver for summer and fall 2022 terms:
- Students have begun enrolling for summer and fall 2022 terms and have been charged tuition for those terms. Since 2022-2023 Fed and CAL ISIRs are being loaded daily, there are students who are enrolled and eligible to receive the CCPG waiver. Can we begin running the CCPG Waiver process to assign the code so eligible students have their tuition waived?
- Initial Pell Disbursement dates:
  - Pell Summer – 6/6
  - Pell Fall – 8/15

4.	UPDATE - Disbursement update – A one-time adjustment (to advance disbursement/refunding prior to the Thursday Chavez holiday) to the Wednesday scheduled disbursement JobSet resulted in the Job's status change from 'Active' to 'Completed'. Consequently, Wednesday disbursements in April have not processed – This explains the delayed refunding of awards processed after 5:30am Mondays. The status is now 'Active'

5.	ONGOING - Confirmation of the new aid year 22/23 budgets is anticipated following the Director's review of samples provided

6.	ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT
- Results run in 'Simulation' will be provided for the FA Director's review and confirmation

7.	UPCOMING - Summer budgets/packaging/repackaging; Spring ending SAP

Thanks, Richard

FA Processing Wednesday 4-27-22
Here's What's Going On:

1.   DONE -The initial external award processing for the Laney ASLC Award for Spring 2022 has been completed in time for Thursday's refunding. Detailed results have been provided to the Laney team

2.   NEW – Jennifer has raised the issue of students not being mass packaged. The issue will be discussed at Thursday's FA Director's meeting. This is similar to the issue raised by Jackie answered by this response:

Hi Jackie - The student was not selected for mass packaging FS-A because she did not meet the criteria for enrollment - IOW, she was not enrolled in F21 term 1214. When auto packaged FS-A she was only awarded S22 term 1222. Perhaps she should have been auto packaged SO-A.
The problem is the system is not set up to mass package SO-A. This is a priority item not yet addressed. Please know that having her review status incomplete had nothing to do with it. The mass packaging Job sets the status to completed if the criteria are met. Let's discuss this in more detail - It's probable additional students s/b packaged spring only - Thanks, Richard

The plan moving forward is to review options to mass package Spring Only plans or add spring admit to the fall/spring plan. Queries are being created to identify spring admits by college. For example, Laney has 1,612 spring admits. A new query is planned to identify spring admits not auto packaged Pell.

3.   NEW – HEERF Annual Report requirements - HEERF APR Now Open!
   •   The Data Collection Tool for the Higher Education Emergency Relief Fund (HEERF) Annual Performance Report is now open for Year 2 Reporting and will close Friday, May 6, 2022
   •   Jennifer states: I am now realizing the May 6 deadline is next Friday. Can we discuss as soon as possible regarding data requests? I learned that the former district FA Analyst provided this data in past years

4.   NEW - Dave has requested processing of the CCPG waiver for summer and fall 2022 terms:

   •   Ken states: Can we please add the CCPG waiver assignment process to tomorrow's FA Processing Meeting agenda? I need to confirm if CCPG's are being assigned daily after ISIRs are loaded.

   •   Students have begun enrolling for summer and fall 2022 terms and have been charged tuition for those terms. Since 2022-2023 Fed and CAL ISIRs are being loaded daily, there are students who are enrolled and eligible to receive the CCPG waiver. Can we begin running the CCPG Waiver process to assign the code so eligible students have their tuition waived?
   •   Initial Pell Disbursement dates:
      o   Pell Summer – 6/6
      o   Pell Fall – 8/15

5. NEW – Home Location Assignment
- Ken states: Where can I view the PeopleSoft setup on how the student's home college is assigned? I just received a file from BankMobile on returned funds and a number of students had a 'District' location. Not sure how this was determined but need to know to assess impact on awarding and other FA processing
- Richard requests from Armany: Can you provide insight regarding setup, or any mod used to determine 'Campus"? We are trying to resolve why BankMobile lists some students with the location of 'District' as opposed to the campus/college. I suspect it may be a default for incomplete information submitted to BankMobile to establish student's Card Files/Profile

- Roderick states: *** Student ID 2 in the spreadsheet is the school code/campus that we send as the very last column of the Demographics file (aka Card file). This is the home campus of the student in his/her acad program plan stack. DISTRICT means it's unknown – usually because the student has no ISIR when the card file was generated.
- Ken states: I'm copying Richard to discuss Item #3 at tomorrow or Thursday's FA Processing meeting.
  - #3 - Can we start including the fund name (e.g. Pell, SEOG, etc.) in the 'Source' column? This will help the colleges with reconciling.
  - *** Yes this is possible. And to clarify, this will be coming from the Refund file correct? I can work with Vu and Joyce to determine the award name. Is "Source" in the spreadsheet you sent? I didn't find it there

6. UPDATE – The Campus Logic meeting has been re-scheduled to Thursday @ 11:00am

7. ONGOING – PLUS Loan processing requests
- Patty states: We have a parent who will be submitting a Parent Plus Loan, and I'm wondering what the status of this request is? Loan brought this issue in January, and we haven't heard anything.

8. ONGOING - Confirmation of the new aid year 22/23 budgets is anticipated following the Director's review of samples provided

9. ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT
- Results run in 'Simulation' will be provided for the FA Director's review and confirmation

10. UPCOMING - Summer budgets/packaging/repackaging; Spring ending SAP

Thanks, Richard
FA Processing Friday 4-29-22

Here's What's Going On:

1. NEW – PLUS Loan processing for BCC student
   - Richard has set up the PLUS Loan Item and Loan type
   - Loan has awarded the PLUS Loan
   - Richard has set up the parent in PSFT
   - Next – Resolve setup issue with the Relationship table
   - Then originate the PLUS Loan to send to COD
   - Confirm DL application to ensure refund directly to student (not parent)
   - Disburse PLUS Loan to student

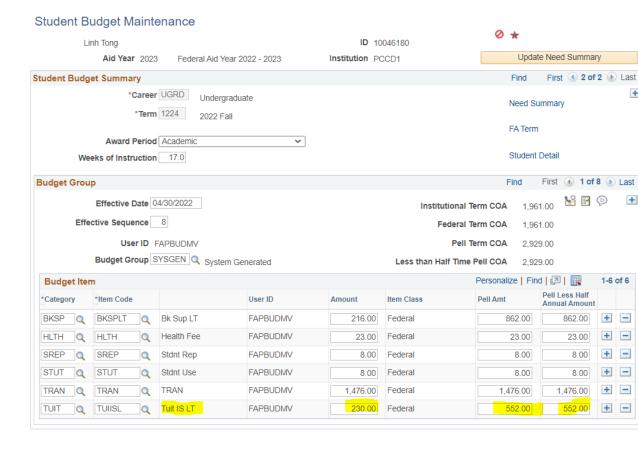2. ONGOING – HEERF APR – Year 2 Annual Performance Report

Note: The amounts below represent FA disbursements:

PAGE 6						
					xxxx	
College of Alameda		UGRD	UGRD	UGRD	UGRD	
		FULL TIME	FULL TIME	PART TIME	PART TIME	
		W/ PELL	W/O PELL	W/PELL	W/O PELL	TOTAL
How many students received HEERF emergency financial aid grants? (unduplicated across all HEERF sections)		175	349	62	511	1097
What was the amount disbursed directly to students a Emergency Financial Aid Grants?		239,400.00	506,974.00	49,100.00	395,589.00	1,191,063.00

3. ONGOING - New aid year 22/23 budgets are confirmed with one exception: The Pell LTHT term and annual amounts for in state and out-of-state

Hi Dave - Just want to make sure I have this right.
Can you please show me where you see the existing amounts that should be changed? For example, the LTHT in state tuition is set at $230. It's based on $46/unit x 5 units = $230. Where do you see that that has to be changed? It used to be $138 (46x3=138) but it has been updated. Where does the $1530/term for the out-of-state come from? It's currently set at $1680 which is $46 + $290= $336 x 5 units = $1680. Should the Pell mount and Pell LTHT amount equal the Federal annual amount?

4.   ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT
- Results run in 'Simulation' will be provided for the FA Director's review and confirmation

5.   UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
- Jackie emphasized summer processing as a top priority
- Summer term starts June 13th
- Need summer budgets and testing
- SAP status required for new students and those not enrolled in spring

Thanks, Richard

FA Processing Monday 5-2-22
Here's What's Going On:

1.   NEW – PLUS Loan processing for BCC student
- Richard has set up the PLUS Loan Item and Loan type
- Loan has awarded the PLUS Loan
- Richard has set up the parent in PSFT
- Next – Resolve setup issue with the Relationship table

- Then originate the PLUS Loan to send to COD
- Confirm DL application to ensure refund directly to student (not parent)
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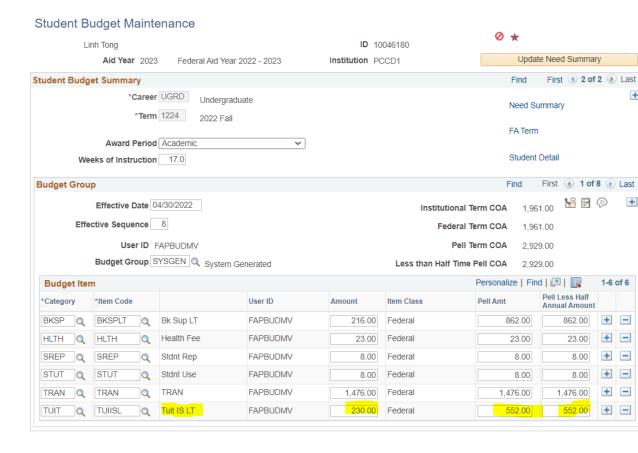2. ONGOING – HEERF APR – Year 2 Annual Performance Report

Note: The amounts below represent FA disbursements:

PAGE 6

College of Alameda					XXXX	
		UGRD	UGRD	UGRD	UGRD	
		FULL TIME	FULL TIME	PART TIME	PART TIME	
		W/ PELL	W/O PELL	W/PELL	W/O PELL	TOTAL
How many students received HEERF emergency financial aid grants? (unduplicated across all HEERF sections)		175	349	62	511	1097
What was the amount disbursed directly to students a Emergency Financial Aid Grants?		239,400.00	506,974.00	49,100.00	395,589.00	1,191,063.00

3. ONGOING - New aid year 22/23 budgets are confirmed with one exception: The Pell LTHT term and annual amounts for in state and out-of-state

Hi Dave - Just want to make sure I have this right.
Can you please show me where you see the existing amounts that should be changed? For example, the LTHT in state tuition is set at $230. It's based on $46/unit x 5 units = $230. Where do you see that that has to be changed? It used to be $138 (46x3=138) but it has been updated. Where does the $1530/term for the out-of-state come from? It's currently set at $1680 which is $46 + $290= $336 x 5 units = $1680. Should the Pell mount and Pell LTHT amount equal the Federal annual amount?

Student Budget Maintenance

Linh Tong   ID 10046180

Aid Year 2023   Federal Aid Year 2022 - 2023   Institution PCCD1   Update Need Summary

Student Budget Summary   Find   First ◀ 2 of 2 ▶ Last

*Career UGRD   Undergraduate   Need Summary

*Term 1224   2022 Fall

Award Period Academic   FA Term

Weeks of Instruction 17.0   Student Detail

Budget Group   Find   First ◀ 1 of 8 ▶ Last

Effective Date 04/30/2022   Institutional Term COA   1,961.00

Effective Sequence 8   Federal Term COA   1,961.00

User ID FAPBUDMV   Pell Term COA   2,929.00

Budget Group SYSGEN System Generated   Less than Half Time Pell COA   2,929.00

Budget Item   Personalize | Find | | | 1-6 of 6

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	Pell Less Half Annual Amount		
BKSP	BKSPLT	Bk Sup LT	FAPBUDMV	216.00	Federal	862.00	862.00	+	−
HLTH	HLTH	Health Fee	FAPBUDMV	23.00	Federal	23.00	23.00	+	−
SREP	SREP	Stdnt Rep	FAPBUDMV	8.00	Federal	8.00	8.00	+	−
STUT	STUT	Stdnt Use	FAPBUDMV	8.00	Federal	8.00	8.00	+	−
TRAN	TRAN	TRAN	FAPBUDMV	1,476.00	Federal	1,476.00	1,476.00	+	−
TUIT	TUIISL	Tuit IS LT	FAPBUDMV	230.00	Federal	552.00	552.00	+	−

4.   ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT
- Results run in 'Simulation' will be provided for the FA Director's review and confirmation

5.   UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
- Jackie emphasized summer processing as a top priority
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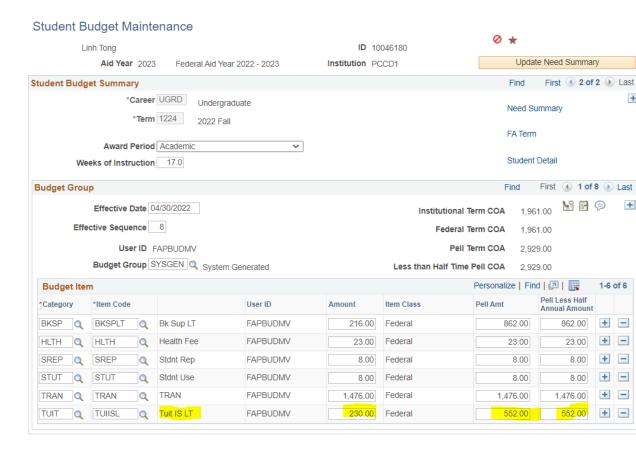- SAP status required for new students and those not enrolled in spring

Thanks, Richard

FA Processing Tuesday 5-3-22
Here's What's Going On:

1.   ONGOING – HEERF APR – Year 2 Annual Performance Report
- The spreadsheet represents the unduplicated number of COA students who were disbursed HEERF funds and the total amount of HEERF funds disbursed by Financial Aid to students in the four categories for the reporting period covering January 1, 2021 - December

31, 2021. Like spreadsheets for the remaining colleges are expected to be completed Tuesday, 5/3

HEERF YEAR 2 ANNUAL REPORT					
PAGE 6					
College of Alameda					
	UGRD	UGRD	UGRD	UGRD	
	FULL TIME	FULL TIME	PART TIME	PART TIME	
	W/ PELL	W/O PELL	W/PELL	W/O PELL	TO
How many students received HEERF emergency financial aid grants? (unduplicated across all HEERF sections)	390	121	247	326	
What was the amount disbursed directly to students a Emergency Financial Aid Grants?	535,800.00	199,724.00	194,200.00	250,489.00	1,180,

2.   ONGOING – Processing of BCC HEERF awards
- 3,800+ students totaling $1,340,000
- Expected to be completed in time for Thursday's refunding

3.   ONGOING – PLUS Loan processing for BCC student
- Richard has set up the PLUS Loan Item and Loan type
- Loan has awarded the PLUS Loan
- Richard has set up the parent in PSFT
- Next – Resolve setup issue with the Relationship table
- Then originate the PLUS Loan to send to COD
- Confirm DL application to ensure refund directly to student (not parent)
- Disburse PLUS Loan to student

4.   ONGOING - New aid year 22/23 budgets are confirmed with one item to confirm:
- The LTHT in state tuition is set at $230 ($46/unit x 5 = $230)
- The Pell and Pell LTHT amount equals the Federal annual amount

5.   ONGOING - New aid year 22/23 set up:
   - Next up: Testing the 22/23 fall/spring mass packaging in UAT
   - Results run in 'Simulation' will be provided for the FA Director's review and confirmation – Question regarding enrollment requirement and spring admits

6.   UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
   - Jackie emphasized summer processing as a top priority
   - Summer term starts June 13th
   - Need summer budgets and testing
   - SAP status required for new students and those not enrolled in spring

7.   FA Projects Discussion with Huron - List
   1. COD Reconciliations (Pell and Direct Loan)
   2. R2T4 and LTHT Pell calculation
   3. CA Processes (CCPG, Cal Grant and Cal ISIR)
   4. SAP
   5. FISAP
   6. One-off Questions

8.   FA Projects Discussion with Huron - Summary

1. COD Reconciliations – Peralta Contact: Jennifer Ma, Laney College FA Director
   a. Representative email from Laney College:

Problem
Laney and our sister colleges have received a significant increase in errors / rejects between what was awarded in PeopleSoft and rejected in C.O.D. That means that we have given money to students that is rejected by COD and thus we cannot drawdown those funds via G5 until the error is corrected.

Problem
Normally, we receive a query from the district with the errors/rejects and the colleges Program Specialists review and make the corrections for the students' files to be accepted by C.O.D. and then we can drawdown the funds. The issue is we have received queries with no reason codes. Our staff cannot make a correction if they don't know why the students file was rejected by C.O.D. Currently, Laney nor our sister colleges can reconcile given this dilemma. We have no resolution to our problem as of yet

Challenge
Unfortunately, as I advance concerns, they are being dismissed as non-systems errors when they clearly are, and no solution is being provided by the district so the colleges can reconcile. I am not interested in blaming anyone, I need our colleagues to collaborate to identify the challenges more effectively I listed above so we can have a solution and reconcile.

The colleges (not just Laney) all noticed increased errors after the upgrade, so there is a correlation. The questions I posed are not directly answered and thus we cannot achieve a solution. Regardless of whether files were externally tested or not; 1) I need the district to clearly support us in identifying what has caused the increased errors and 2) when will they provide us queries with reason codes for the errors? Please remember, we cannot correct an error from the C.O.D. without knowing the reason.

   b. Evaluate potential benefits of TD Client

2. R2T4
   a. *See audit findings*
   b. LTHT Pell - There are a lot of students in the R2T4 list received the wrong amount for LTHT. I provide one student for the IT to do the investigation. LTHT should be awarded as $732 with EFC 0. System awarded $812

3. CA Processes:
   a. CCPG – Peralta Contact: Roderick Fajarda, IT; Jackie Vo, Alameda FAO
      i. Must apply waiver each term before Pell disbursement
      ii. Recent CCPG ineligible student status

          iii. Roderick created the updated non-SSN files with corrected GPA values. Note, other errors might still be there as this fix is only for the GPA formatting

          iv. BOG Evaluation, BOG Waiver

          v. Roderick states: I have completed the process of running evaluation process. Please refer below for the list of queries that needs to mass update.

               1. PCCFA_BOG_EXMPT_FOSTER

               2. PCCFA_BOG_EXMPT_PROGRESS

               3. PCCFA_BOG_EXMPT_PROBATION

               4. PCCFA_BOG_EXMPT_REGISTERED

          vi. CCPG Probation Letter – Not sent for F21

          vii. CCPG Disqualification Letter – Not sent for F21`

          viii. Online Application - revisit the set up for the Online CCPG process/implementation

          ix. Eliminate paper apps?

          x. Jackie states: I would like to request that we revisit the set up for the Online CCPG process/implementation. Some of the issues that we've encountered so far are:

               1. Some students submitted the Online CCPG at Alameda, but it's under Merritt query.

               2. The Online CCPG application tells students they are applying for fall 2020, spring 2021 & summer 2021 (summer being a footer). However, we have always used summer as a header.

I'm willing to assist with the review if needed.

      b.   Cal Grant Automation – Peralta Contact: Roderick Fajarda, IT

          i. Loading Cal Grant Rosters: This has always been a manual process (on the FA analysts' part). The instructions left by prior analysts were very cumbersome and did not work and are obsolete now that we are in 9.2. We were able to install an automation (taken from CSU) that has not yet been tested. The business procedure and specifications are saved in our FA folder. Each college seems to have their own way of handling their rosters.

          ii. Roderick: I'm not able to test "Load Cal grant Changes"/CSUFA008 due to missing PS_CSU_MCS_TERMREF table definition from the Cal grant Mod project that CSU provided

      c.   CAL ISIRs – Peralta Contact: Roderick Fajarda, IT; Amanda Lim, District FA

          i. Review CAL ISIR load process for improvement

4. SAP – Peralta Contact: Jackie Vo, Alameda FAO
- SAP has never run properly
- Not all students with gaps in enrollment get captured
- There are students that get placed in UNDT status and even by using a query to capture them and re-run SAP they do not get changed. These have to be changed manually

- We did a 'quick fix' for Spring 2020 students who were affected by Covid where their SAP status from Fall 2019 would roll to their next term of enrollment after Spring 2020 (voiding what may have happened in Spring). While the status changed, the quantitative calculation of attempted units did not. This will need to be a bigger project/modification
- Jackie Vo: Our FAO found out that there are some students having incorrect Maximum Attempted Units. I'm not sure why but I would appreciate it if you could look into this - Donna Hooper- 10614167: Her SAP status shows as "MEET," but she's Max Hours. Under the Maintain Student SAP Data page, the maximum attempted units show as -866.50.

5. FISAP
- The delivered FISAP product with PeopleSoft 9.2 does not support multi-campus districts
- The delivered FISAP queries will not separate the data per college. This will require a modification IF run using the delivered process
- In the past there were queries made by the previous District FA Director however with the migration to 9.2 these queries did not survive the transition
- As a work around for the future, colleges can work with their IR (or FA analysts if available) to identify the fields that need to be captured so that the reports can be accurate
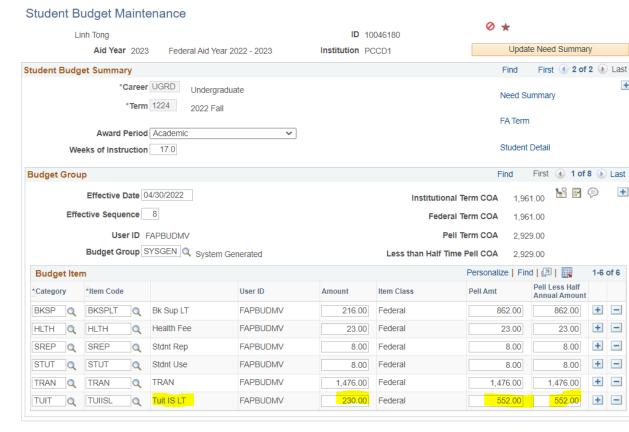
6. General Questions:
- Review Setup – FA Install has Aggregate Source PS as opposed to NSLDS. The NSLDS Push process is not run
- Review Setup - Summer term Award Period is set as Academic

Thanks, Richard

FA Processing Wednesday 5-4-22
Here's What's Going On:

1.   ONGOING – HEERF APR – Year 2 Annual Performance Report
- The spreadsheet representing the unduplicated number of HEERF student recipients and the HEERF Student Aid amount disbursed for the reporting period January 1, 2021 - December 31, 2021, broken out by category requested on Page 6 has been released for each college

2.   ONGOING – Processing of BCC HEERF awards
- The list contains 3,879 students
- 423 or 11% were awarded without errors - I'll move to disburse the students who authorize - DONE
- 1006 or 26% errored with code 601 indicating the student is not active for the aid year - If these students are eligible, I'll determine the way to process them
- 2450 or 63% were not awarded with the processing status of 'Duplicate' - Preliminary reviews indicate duplicate students have the award for fall term - Do you agree? If so, are they eligible for the spring term? If so, I'll determine the way to process them
- Going forward:

    o   FA confirmation is requested that, given the processing results, the students not yet awarded are eligible

    o   If duplicate status students are eligible, Richard and Roderick need to determine how to process the awards

3.   ONGOING – PLUS Loan processing for BCC student
- Richard has set up the PLUS Loan Item and Loan type
- Loan has awarded the PLUS Loan
- Richard has set up the parent in PSFT
- Next – Resolve setup issue with the Relationship table
- Then originate the PLUS Loan to send to COD
- Confirm DL application to ensure refund directly to student (not parent)
- Disburse PLUS Loan to student

4.   ONGOING - New aid year 22/23 budgets are confirmed with one item Dave has been requested to confirm:
- The LTHT in state tuition is set at $230 ($46/unit x 5 = $230)
- The Pell and Pell LTHT amount equals the Federal annual amount

Student Budget Maintenance

Linh Tong   ID 10046180

Aid Year 2023   Federal Aid Year 2022 - 2023   Institution PCCD1   Update Need Summary

Student Budget Summary
Find   First ◀ 2 of 2 ▶ Last

*Career UGRD   Undergraduate   Need Summary

*Term 1224   2022 Fall

Award Period Academic   FA Term

Weeks of Instruction 17.0   Student Detail

Budget Group
Find   First ◀ 1 of 8 ▶ Last

Effective Date 04/30/2022   Institutional Term COA   1,961.00

Effective Sequence 8   Federal Term COA   1,961.00

User ID FAPBUDMV   Pell Term COA   2,929.00

Budget Group SYSGEN 🔍 System Generated   Less than Half Time Pell COA   2,929.00

Budget Item
Personalize | Find | 🔁 | 🔢   1-6 of 6

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	Pell Less Half Annual Amount		
BKSP 🔍	BKSPLT 🔍	Bk Sup LT	FAPBUDMV	216.00	Federal	862.00	862.00	+	−
HLTH 🔍	HLTH 🔍	Health Fee	FAPBUDMV	23.00	Federal	23.00	23.00	+	−
SREP 🔍	SREP 🔍	Stdnt Rep	FAPBUDMV	8.00	Federal	8.00	8.00	+	−
STUT 🔍	STUT 🔍	Stdnt Use	FAPBUDMV	8.00	Federal	8.00	8.00	+	−
TRAN 🔍	TRAN 🔍	TRAN	FAPBUDMV	1,476.00	Federal	1,476.00	1,476.00	+	−
TUIT 🔍	TUIISL 🔍	Tuit IS LT	FAPBUDMV	230.00	Federal	552.00	552.00	+	−

5.   ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT

- Results run in 'Simulation' will be provided for the FA Director's review and confirmation – Question regarding enrollment requirement and spring admits

6. UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
   - Jackie emphasized summer processing as a top priority
   - Summer term starts June 13th
   - Need summer budgets and testing
   - SAP status required for new students and those not enrolled in spring

7. Additional Items:
   - ATB and Citizenship - Pell Rejects
     1. **Managing the ATB status via the Student Eligibility Code (SEC) field** (Note – these are HURON's findings and recommended solutions, which is consistent with Dave's recommendation)
        i. There is an automated batch process to assign the correct Student Eligibility Code (SEC) to resolve ATB error
        ii. SEC field should be configured to populate based on HS Diploma question on the ISIR. It is not configured right now since Aid Year field is missing
     2. **Managing the Citizenship Status on the Pell Payment screen in PS**
        i. There is an automated batch process to assign the correct citizenship status
        ii. @Dave Nguyen Feel free to add any pertinent details I may be missing

   - CIP Code Disbursement Reject
   Hi Ken - Yes, I'll work with Roderick to summarize the situation and we can put together a plan for the fix - I'll give a progress update tomorrow morning (although more time is needed to finalize the plan) - Thanks, Richard
   Roderick - This summarizes the first issue to resolve:
   It has been determined the 21/22 rejects were due to the run control in the custom CIP update process still pointing to the even year 2020. In other words, it was not updated as part of the new aid year processing. Although the run control has been corrected, files sent containing the trailing letter need to be identified and re-sent with the corrected CIP.
   Roderick, do you recall this issue?
   Somehow, I think we can work together to look back and come up plans to re-submit - Thanks, Richard

   - Spring 2022 SAP Disq Notification Failed to be Sent
   Dave states: I want to report an issue with the Spring SAP notifications not being sent out for some students. Four were reported to me but there are more students out there.

To Ken et. Al – Should we still run this process for Spring to send them the notifications? This will be an audit concern since we are required to notify the student and have not yet. However, the semester is almost over and appeal submission deadlines are either past or will be shortly at each campus. Students may be upset if they get a SAP disqualification notification and cannot resolve. Would love to hear your thoughts and feedback.

Thanks, Richard

FA Processing Monday 5-9-22
Here's What's Going On:
1.   UPDATE – HEERF Year 2 Annual Performance Report
- Status of submission

2.   ONGOING – Processing of BCC HEERF awards
- 2450 or 63% were not awarded with the processing status of 'Duplicate' – Loan has confirmed they are eligible. Richard and Roderick to determine how to process them
- Still need confirmation if the 1,006 student not active for the aid year are eligible. Richard to work with Loan

3.   ONGOING – PLUS Loan processing for BCC student
- Next – Resolve setup issue with the Relationship table
- Then originate the PLUS Loan to send to COD
- Confirm DL application to ensure refund directly to student (not parent)
- Disburse PLUS Loan to student

4.   ONGOING - New aid year 22/23 budgets are confirmed and will be built in PRD within days

5.   ONGOING - New aid year 22/23 set up:
- Next up: Testing the 22/23 fall/spring mass packaging in UAT
- Results run in 'Simulation' will be provided for the FA Director's review and confirmation – Question regarding enrollment requirement and spring admits

6.   UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
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- Need summer budgets and testing
- SAP status required for new students and those not enrolled in spring

7.   Additional Ongoing Items:
- ATB and Citizenship - Pell Rejects
  1.   Managing the ATB status via the Student Eligibility Code (SEC) field
     a.   SEC field should be configured to populate based on HS Diploma question on the ISIR. It is not configured right now since Aid Year field is missing
  2.   Managing the Citizenship Status on the Pell Payment screen in PS
     a.   There is an automated batch process to assign the correct citizenship status

- CIP Code Disbursement Reject
  a. Richard and Roderick to identify file/s sent using incorrect run control with a plan to resubmit without the trailing letter code
- Spring 2022 SAP Disq Notification Failed to be Sent
  a. Richard to confirm email template wording with Jackie
  b. Roderick to confirm selection queries with Dave

Thanks, Richard

FA Processing Monday 5-9-22
Here's What's Going On:

1. UPDATE – HEERF Year 2 Annual Performance Report
   - Status of submission

2. ONGOING – Processing of BCC HEERF awards
   - 2450 or 63% were not awarded with the processing status of 'Duplicate' – Loan has confirmed they are eligible. Richard and Roderick to determine how to process them
   - Still need confirmation if the 1,006 student not active for the aid year are eligible. Richard to work with Loan

3. ONGOING – PLUS Loan processing for BCC student
   - Next – Resolve setup issue with the Relationship table
   - Then originate the PLUS Loan to send to COD
   - Confirm DL application to ensure refund directly to student (not parent)
   - Disburse PLUS Loan to student

4. ONGOING - New aid year 22/23 budgets are confirmed and will be built in PRD within days

5. ONGOING - New aid year 22/23 set up:
   - Next up: Testing the 22/23 fall/spring mass packaging in UAT
   - Results run in 'Simulation' will be provided for the FA Director's review and confirmation – Question regarding enrollment requirement and spring admits

6. UPCOMING PRIORITY - Summer budgets/packaging/repackaging; Spring ending SAP
   - Jackie emphasized summer processing as a top priority
   - Summer term starts June 13th
   - Need summer budgets and testing
   - SAP status required for new students and those not enrolled in spring

7. Additional Ongoing Items:
   - ATB and Citizenship - Pell Rejects
     1. Managing the ATB status via the Student Eligibility Code (SEC) field
        a. SEC field should be configured to populate based on HS Diploma question on the ISIR. It is not configured right now since Aid Year field is missing
     2. Managing the Citizenship Status on the Pell Payment screen in PS
        a. There is an automated batch process to assign the correct citizenship status
   - CIP Code Disbursement Reject

            a.   Richard and Roderick to identify file/s sent using incorrect run control with a plan to resubmit without the trailing letter code

- Spring 2022 SAP Disq Notification Failed to be Sent
  - a.   Richard to confirm email template wording with Jackie
  - b.   Roderick to confirm selection queries with Dave

Thanks, Richard

FA Processing Tuesday 5-10-22
Here's What's Going On:

1. HURON UPDATE:
   - Laney COD reconciliation
   - R2T4
   - LTHT

2. ONGOING - New Aid Year 22/23
   - Loading ISIRs
   - Assigning checklists
   - Sending 'Thank you' emails
   - Building FA Terms
   - Assigning Mismatch/Ineligible major checklists
   - Building budgets
     - Roderick - Please now activate FAB165/PCCFA084 so that it begins tonight (5/10/22) at 10PM
   - Next – Fall/Spring Mass Packaging & Repackaging (Director's to review simulation)
     - Roderick - Testing of the new aid year 22/23 Pell Grant indicates the Pell tables may not have been loaded into PRD. In fact, the test results return the old 21/22 aid year amounts
     - Roderick – Load the Pell Table: Set up SACR > Product Related > Awards > Pell Table Load
   - Next - Sending Award Notification

3. UPCOMING - Summer budgets/packaging/repackaging; Spring ending SAP
   - Summer term starts June 13th
   - Need summer budgets and testing
   - SAP status required for new students and those not enrolled in spring

4. ONGOING – Processing of BCC HEERF awards

5. ONGOING – PLUS Loan processing for BCC student

6. ONGOING - Additional Items:
   - ATB and Citizenship - Pell Rejects
   - CIP Code Disbursement Reject
   - Spring 2022 SAP Disq/Warning notifications failed to be sent

Thanks, Richard

FA Processing Wednesday 5-11-22
Here's What's Going On:

1. ONGOING - New Aid Year 22/23
   - Building budgets
     o NO SUCCESS – Newley activated PCCFA084 failed. Roderick reviewed and rescheduled EVEN/ODD Jobs to different times
   - SUCCESS – Revised Pell Tables have been loaded for the new aid year 22/23
   - Next – 22/23 Fall/Spring Mass Packaging – Working on selection process
   - Next - Award Notification

2. UPCOMING - Summer budgets/packaging/repackaging

3. UPCOMING - Spring ending SAP – Review Ken's SAP Email Follow-Up

4. ONGOING – Processing of BCC HEERF awards

5. ONGOING – PLUS Loan processing for BCC student

6. ONGOING - Additional Items:
   - ATB and Citizenship - Pell Rejects
   - CIP Code Disbursement Reject
   - Spring 2022 SAP Disq/Warning notifications failed to be sent
   - LTHT Pell
     o Yesterday 11:43 AM - Dave Nguyen Tim sent me an outline on potential resolution for LTHT. I haven't had the opportunity to follow up and review
   - Missing Information Letters – Review/revive past practice
   - PUM 22,23,25 – When to apply – Mtg w/ Teresa today @ 10AM
   - COA request to award SEOG increases for COA – 200+ students , $114,000
   - COA request to load HEERF Grocery Grant

Thanks, Richard

FA Processing Thursday 5-12-22
Here's What's Going On:

1. BOG Waiver Reversal Plan: 3-15-22 – Blank Equation Variable Var Char #1

   - Latest comments regarding CCPG reversals:
     o 3-24 - We are ready to reverse CCPG waivers once notification emails are sent – Colleges will be notified and expected increased contact from students
     o 3-17 We are ready to reverse CCPG waivers

   Roderick Fajarda

Tue 3/15/2022 4:47 PM

Hi Richard,

Please see the plan below regarding the recovery of the BOG Waiver amounts that were awarded incorrectly.

Please note:

Loan's spreadsheet has a total of 3185 students (see attached spreadsheet – **List of Bog Waiver no FAFSA All colleges 2021-2022.xls**).

Loan has specified the SQL that she ran to produce this list:

CCPG_LOAD_ERROR_SPRING_2022

I ran the same query this afternoon and got 3140 rows

***

Plan in PROD:

***

Steps:

1. ~~Mark Johnson will send out the emails to students based on the latest email id spreadsheet sent to Aaron Harbour (attached in this email as well).~~
2. For the list of students with invalid BOG waivers, run the Pop Update to set the Variable Character #1 to Blank
   Count as of 3pm, 3/15/2022 = 3140

   > OPRID = FABATCH
   > Run Control ID = REVERSE_STDNTS_CCPG_WAIVER
   > Purpose: Blank out User Variable Character #1 on STDNT_EQTN_VAR for the 3140 students
   > Input File: STDNT_EQUTN_VAR_PROD_ReverseUpdate_3140Rows.txt
3. Student Financials (Vu) will run Tuition Calculation for the students in item #1
4. Teresa will run a backend delete on all STDNT_EQUTN_VAR rows for the 3140 students

Hi Rod,

This is the result of the test: out of 3,181 students from the list, all except 154 students have waivers removed. So, I deep dived on these 154 students, their equation variable's "var char 1" were not cleared. So, I would say that the solution works, but you have to make sure you cleared "var char 1" every students on the list - Vu Nguyen

2.   ONGOING - New Aid Year 22/23
   - Next – 22/23 Fall/Spring Mass Packaging – Working on selection process
   - Next - Award Notification

3.   UPCOMING - Summer budgets/packaging/repackaging

4.   UPCOMING - Spring ending SAP – A comparison s/b undertaken btwn query SAP_NO_COMM_1 used by Dave and PCCFA_SAP_DISQ_ALL_CAMPUSES used in the 3C Engine process to assign the FP4 SAP Disqualification letter code

5.   ONGOING – Processing of BCC HEERF awards

6.   ONGOING – PLUS Loan processing for BCC student – SR filed with Oracle regarding Relationship error msg

7.   ONGOING - Additional Items:
   - ATB and Citizenship - Pell Rejects
   - CIP Code Disbursement Reject
   - Spring 2022 SAP Disq/Warning notifications failed to be sent
   - LTHT Pell
     o Yesterday 11:43 AM - Dave Nguyen Tim sent me an outline on potential resolution for LTHT. I haven't had the opportunity to follow up and review
   - Missing Information Letters – Review/revive past practice
   - PUM 22,23,25 – When to apply – Mtg w/ Teresa today @ 10AM
   - COA request to award SEOG increases for COA – 200+ students , $114,000
   - COA request to load HEERF Grocery Grant

8.   ONGOING – CCPG Waivers
   - NEW - Dave has requested processing of the CCPG waiver for summer and fall 2022 terms:

   - Ken states: Can we please add the CCPG waiver assignment process to tomorrow's FA Processing Meeting agenda? I need to confirm if CCPG's are being assigned daily after ISIRs are loaded.

   - Students have begun enrolling for summer and fall 2022 terms and have been charged tuition for those terms. Since 2022-2023 Fed and CAL ISIRs are being loaded daily, there are students who are enrolled and eligible to receive the CCPG waiver. Can we begin running the CCPG Waiver process to assign the code so eligible students have their tuition waived?
   - Initial Pell Disbursement dates:
     o Pell Summer – 6/6
     o Pell Fall – 8/15

Thanks, Richard

FA Processing Friday 5-13-22
Here's What's Going On:
1.   BOG Waiver Reversal Plan:
   - Updated student listing
   - Set Var Char 1 to blank/delete row
   - Test in UAT

2.   ONGOING - New Aid Year 22/23
   - Next – 22/23 Fall/Spring Mass Packaging – Working on selection process
   - Next - Award Notification

3.   UPCOMING - Summer budgets/packaging/repackaging

4.   UPCOMING – SAP for Summer and Fall

5.   ONGOING - Roderick and Richard in final stages of testing SEOG increases for COA – 200+ students , $114,000

6.   UPCOMING - System Updates:
- Refresh of UAT – May 25th
- Refresh of DEV – June 1st
- End of PUM 25 testing in UAT – July 15th
- PUM 25 applied to PRD – July 17th

7.   ONGOING – Processing of BCC HEERF awards (Duplicate issue)

8.   ONGOING – PLUS Loan processing for BCC student – SR filed with Oracle. Teresa and Richard now reviewing the parent status in PSFT

9.   ONGOING - Additional Items:
- ATB and Citizenship - Pell Rejects
- CIP Code Disbursement Reject
- Spring 2022 SAP Disq/Warning notifications failed to be sent
- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant

10.   ONGOING – CCPG Waiver assignment

Thanks, Richard

FA Processing Monday 5-16-22
Here's What's Going On:
1.   Upcoming Peralta Holiday
- Thursday 5-19
- Refunding moved to Wednesday

2.   BOG Waiver Reversal Plan:
- Updated student listing
- Set Var Char 1 to blank/delete row
- Add back in the yellow highlighted students with their new code
- Test in UAT
- Coordinate with Vu/Joyce
- Dave states: I did a review today and there are 2387 spring 2022 enrolled undergraduate students who currently have a CCPG waiver (method C) and do not have a FED ISIR or CAL ISIR on file at Peralta. Based on the conversation with Rhonda at today's directors meeting, I also revisited the query to add a rule for students who were enrolled, charged tuition, did not have a fed or cal isir, and are no longer enrolled for Spring 2022. Fortunately, there were zero students affected. I am attaching the list. I believe the CCPG tuition waiver code needs to be removed for these students.

- For Jennifer – I remember you mentioning this before but some of these students had an original waiver code that was incorrectly overridden with this method C code by the system. These students originally had either had a paper/online ccpg application, an employee tuition waiver, or another waiver that is coded F3 (I don't know what this waiver is – maybe veterans waiver?) I think we decided to ask Richard(?) put back the original code (especially for CCPG method B) so we can claim credit for these students for MIS reporting. The students with the original code are also indicated on the spreadsheet (highlighted in yellow).

- Roderick states: I went ahead and ran in UAT the steps mentioned in my email for the BOG waiver reversal plan, except for the row deletion. Students affected are in the attached list.

3. NEW - 21-22 CAL ISIR Import error for Wendy Villalobos
   - 21-22 CAL ISIR for Miguel Villalobos was imported into the wrong student record for Wendy Villalobos
   - Roderick, Amanda - Please take the lead on this CAL ISIR issue. I ask because of your work with the colleges to set up/test/process CAL ISIRs and have familiarity with the Peralta SA Custom California ISIR Processing functionality

4. ONGOING - New Aid Year 22/23
   - Next – 22/23 Fall/Spring Mass Packaging/Repackaging – Working on selection process
   - Next - Award Notification

5. UPCOMING - Summer budgets/packaging/repackaging
   - Ken states: Summer is typically a trailer except for the year round Pell Grant students. I would think the setup is needed for both years. This would capture any 21-22 students (Summer 2022) who have not received 100% of their Pell Grant, plus the Summer 2023 YRP (Yr Rnd Pell) students. I'll confirm both with Richard today and let you know

   - Patty states: Kent informed me today that the summer term award is under 2022-2023 and not under 2021-2022. Please confirm with Richard that the summer term award needs to be under 2021-2022.

6. UPCOMING – SAP for Summer and Fall
   - Also, update SAP communications
   - SAP processing review meeting this morning - General discussion on SAP processing for the upcoming summer and fall terms
   - Roderick requested to setup JobSets for SAP – Summer and Spring
     o Hi Roderick - Let's work to set up the following JobSets:
       - **FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)**

- **FA_SAP_PROCESS_FALL_ODD (AY 2023)**

7.   ONGOING - Roderick and Richard in final stages of testing SEOG increases for COA – 200+ students , $114,000
- 104 processed, 107suspeneded
- Hi Roderick - Thanks for staging 10 (out of 107) students whose status was changed from Unprocessed to Suspend when the load process was run.
Unfortunately, the load process for the 10 students again changed their status to Suspend. I recommend the following:

- Stage the original file of 219 students in PRD with the disbursement plan of FS
- I'll then run the load process - 112 will be processed and 107 will suspend. This will, at least, get about half of the listed students awarded
- File the SR with Oracle to see what is recommended
- Richard and Roderick to process the 112 in PRD and leave the 107 in UAT until we work the issue with Oracle

8.   UPCOMING - System Updates:
- Refresh of UAT – May 25th
- Refresh of DEV – June 1st
- End of PUM 25 testing in UAT – July 15th
- PUM 25 applied to PRD – July 17th

9.   ONGOING – Processing of BCC HEERF awards (Duplicate issue)
- Hi Roderick - In PRD, I loaded the 7 students, and they were not processed as expected. Their processing status changed back to Duplicate which prompts the question: Was the code changed from NEW to APPEND? Thanks, Richard

10.   ONGOING – PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships
- Hi Patty, Loan - Teresa fixed the system on Friday and the relationship between the student and parent has now been established. The next steps are to check on the status of the origination and acknowledgement from COD. The loan failed origination on Friday with the following reasons which I will look into next:

Description
Invalid or missing Borrower SSN
Invalid Borrower Birthdate
Invalid Borrower Name
Borrower Address is Incomplete
Borrower is not eligible (Citizenship Status)

11.   ONGOING - Additional Items:
- ATB and Citizenship - Pell Rejects
- CIP Code Disbursement Reject
- Spring 2022 SAP Disq/Warning notifications failed to be sent
  - Per today's FA Director meeting, here is the query for students with no SAP comm or incomplete COMM for Spring 2022. I also added in the rule that they did not receive a pell grant for Spring 2022. After adding the rule, the headcount did not change. You can run the query by school code. Query Name: SAP_NO_COMM_1
  - Richard - Can you show on Monday how to view the SAP info in PeopleSoft so that I can compare the students on both lists and let you know what I find out. The directors are pretty busy, so I figured I could help with comparing the info.
    - FA_SFA_SAP_STDNT_1222_RWD – This query shows SAP status for Spring 2022 (1222)
- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant

12.   ONGOING – Daily scheduling of the CCPG Waiver assignment
- Roderick is working with Dave to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled

Thanks, Richard

FA Processing Monday 5-17-22
Here's What's Going On:
1.   Huron Update

2.   Summer 2022 setup – Need to rebuild summer FA Terms

3.   BOG Waiver Reversal Plan:
- Updated student listing
- Set Var Char 1 to blank/delete row
- Add back in the yellow highlighted students with their new code
- Test in UAT
- Coordinate with Vu/Joyce

- Dave states: I did a review today and there are 2387 spring 2022 enrolled undergraduate students who currently have a CCPG waiver (method C) and do not have a FED ISIR or CAL ISIR on file at Peralta. Based on the conversation with Rhonda at today's directors meeting, I also revisited the query to add a rule for students who were enrolled, charged tuition, did not have a fed or cal isir, and are no longer enrolled for Spring 2022. Fortunately, there were zero students affected. I am attaching the list. I believe the CCPG tuition waiver code needs to be removed for these students.

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   - Hi Roderick - Thanks for staging 10 (out of 107) students whose status was changed from Unprocessed to Suspend when the load process was run.
   Unfortunately, the load process for the 10 students again changed their status to Suspend. I recommend the following:

     - Stage the original file of 219 students in PRD with the disbursement plan of FS
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     - File the SR with Oracle to see what is recommended
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   - Refresh of DEV – June 1st
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   - Hi Patty, Loan - Teresa fixed the system on Friday and the relationship between the student and parent has now been established. The next steps are to check on the status of the origination and acknowledgement from COD. The loan failed origination on Friday with the following reasons which I will look into next:

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Invalid or missing Borrower SSN
Invalid Borrower Birthdate
Invalid Borrower Name
Borrower Address is Incomplete
Borrower is not eligible (Citizenship Status)

12. ONGOING - Additional Items:
- ATB and Citizenship - Pell Rejects
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  o Richard - Can you show on Monday how to view the SAP info in PeopleSoft so that I can compare the students on both lists and let you know what I find out. The directors are pretty busy, so I figured I could help with comparing the info.
    ▪ FA_SFA_SAP_STDNT_1222_RWD – This query shows SAP status for Spring 2022 (1222)
- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant

13. ONGOING – Daily scheduling of the CCPG Waiver assignment
- Roderick is working with Dave to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled

Thanks, Richard

FA Processing Wednesday 5-18-22
Here's What's Going On:
1. Huron working with Laney College – Training on COD processing

2. Richard has query requests from Laney College

3. TOP PRIORITY - Summer 2022 setup – Need to rebuild summer FA Terms with summer as trailer – Ticket filed with Oracle
- Setup has been adjusted – 179 FA Terms built since 5/16 (Monday) have summer as trailer – Good!
- Task now is to rebuild those with summer header
- Some colleges are inactivating the term - Hmmm

4.   TOP PRIORITY – Summer and Fall SAP

5.   TOP PRIORITY – Confirm summer budgets

6.   TOP PRIORITY – Summer and Fall packaging/repackaging/Award notification

7.   BOG Waiver Reversal Plan:
- Updated student listing
- Set Var Char 1 to blank/delete row
- Add back in the yellow highlighted students with their new code
- Test in UAT
- Coordinate with Vu/Joyce
- Dave states: I did a review today and there are 2387 spring 2022 enrolled undergraduate students who currently have a CCPG waiver (method C) and do not have a FED ISIR or CAL ISIR on file at Peralta. Based on the conversation with Rhonda at today's directors meeting, I also revisited the query to add a rule for students who were enrolled, charged tuition, did not have a fed or cal isir, and are no longer enrolled for Spring 2022. Fortunately, there were zero students affected. I am attaching the list. I believe the CCPG tuition waiver code needs to be removed for these students.

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- Roderick states: I went ahead and ran in UAT the steps mentioned in my email for the BOG waiver reversal plan, except for the row deletion. Students affected are in the attached list.

8.   UPCOMING – SAP for Summer and Fall
- Also, update SAP communications
- SAP processing review meeting today @1:00 - General discussion on SAP processing for the upcoming summer and fall terms

- Will also include Past process to populate citizenship records for COD processing, ATB checklist, status of additional COA SEOG awarding
- Roderick requested to setup JobSets for SAP – Summer and Spring
  - Hi Roderick - Let's work to set up the following JobSets:
    - **FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)**
    - **FA_SAP_PROCESS_FALL_ODD (AY 2023)**

9. ONGOING - Roderick and Richard in final stages of testing SEOG increases for COA – 200+ students , $114,000
   - 100+ are processed and disbursed for today's refunding
   - 100+ with 'Suspend' process – Ticket filed with Oracle

10. UPCOMING - System Updates:
    - Refresh of UAT – May 25th
    - Refresh of DEV – June 1st
    - End of PUM 25 testing in UAT – July 15th
    - PUM 25 applied to PRD – July 17th

11. ONGOING – Processing of BCC HEERF awards (Duplicate issue)
    - 2,000+ disbursed $895K to be refunded today

12. ONGOING – PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships
    - Hi Patty, Loan - Teresa fixed the system on Friday and the relationship between the student and parent has now been established. The next steps are to check on the status of the origination and acknowledgement from COD. The loan failed origination on Friday with the following reasons which I will look into next:

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    - ATB and Citizenship - Pell Rejects
    - CIP Code Disbursement Reject
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change. You can run the query by school code. Query Name: SAP_NO_COMM_1

o   Richard - Can you show on Monday how to view the SAP info in PeopleSoft so that I can compare the students on both lists and let you know what I find out. The directors are pretty busy, so I figured I could help with comparing the info.

▪   FA_SFA_SAP_STDNT_1222_RWD – This query shows SAP status for Spring 2022 (1222)

- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant

14.   ONGOING – Daily scheduling of the CCPG Waiver assignment
- Roderick is working with Dave to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled

15.   Working on new COA request to award $1.1M in HEERF III

Thanks, Richard

FA Processing Friday 5-20-22
Here's What's Going On:

1.   ***TOP PRIORITY*** - Summer 2022 setup
- Need to rebuild summer FA Terms with summer as trailer – Ticket filed with Oracle. Unresolved: Calculated Aid Year remains 2023
- Setup has been adjusted – Terms built since 5/16 (Monday) have summer as trailer
- Completion target – 5/25

2.   ***TOP PRIORITY*** – Summer and Fall SAP and SAP Communications
- Roderick requested to setup JobSets for SAP – Summer and Spring
  - **FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)**
  - **FA_SAP_PROCESS_FALL_ODD (AY 2023)**
- Target completion – 5/25

3.   ***TOP PRIORITY*** – Confirm summer budgets
- Academic vs. Non-Standard Award Period
- Review LTHT summer budget amounts
- Budget Duration setup / WOI = INAS Calc
- Target completion – 5/25

4.   ***TOP PRIORITY*** – Summer and Fall packaging/repackaging/Award notification/CCPG Waiver
- Summer term starts June 13th
- Initial Pell disbursement Summer – 6/6
- Initial Pell disbursement Fall – 8/15

5.   UPCOMING - System Updates:
- Refresh of UAT – May 25th
- End of PUM 25 testing in UAT – July 15th
- PUM 25 applied to PRD – July 17th

6.   ONGOING - BOG Waiver Reversal Plan:
- Ken - Updated student listing to Roderick
- Roderick - Set Var Char 1 to blank/delete row
- Vu/Joyce – Tuition Calc and HEERF offset

7.   ONGOING - Final stage for COA SEOG
- 100+ with 'Suspend' process – SR with Oracle

8.   ONGOING – Processing of BCC HEERF award
- Requires final resolution of remaining students not disbursed

9.   ONGOING - Working on new COA request to award $1.1M in HEERF III
- Notify Dave before actual processing to allow for student communications

10.   ONGOING – PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships
- The loan failed origination – Resolution required

11.   ONGOING - Additional Items:
- ATB/Citizenship/CIP Code Failures/Rejects
- Spring 22 SAP Disq/Warning notifications failed to be sent (some were sent)
- Spring 22 CCPG Disq/Warning notifications not sent
- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant
- Laney College request for query support

12.   ONGOING – Scheduling of the CCPG Waiver assignment
- Roderick is working with Dave to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled

13.   NEW - New FAFSA Verification Requirement Waivers for 2022-23

14.   NEW – FA District IT Project Update

15.   NEW – Subsequent ISIRs not being loaded once packaged

FA Processing Monday 5-23-22
Here's What's Going On:
1.   *TOP PRIORITY* - Summer 2022 setup
- Need to rebuild summer FA Terms with summer as trailer – Ticket filed with Oracle. Unresolved: Calculated Aid Year remains 2023
- Roderick – Please follow up with Teresa ASAP to run the 2nd SQL update with Active Status and Source of Term

- Roderick – Please follow up with Brenda ASAP – DONE
- Roderick – Please create SQL to update Calculated Aid Year
- Setup has been adjusted – Terms built since 5/16 (Monday) have summer as trailer
- Completion target – Wednesday 5/25 (in time for UAT refresh)

2. ***TOP PRIORITY*** – Confirm summer budgets
   - Academic vs. Non-Standard Award Period
   - Review LTHT summer budget amounts
   - Budget Duration setup / WOI = 6 Wks / INAS Calc
   - Target completion – 5/25

3. ***TOP PRIORITY*** – Summer and Fall SAP and SAP Communications
   - Roderick requested to setup JobSets for SAP – Summer and Spring
     - **FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)**
     - **FA_SAP_PROCESS_FALL_ODD (AY 2023)**
   - Target completion – Wednesday 5/25 (in time for UAT refresh)

4. ***TOP PRIORITY*** – Summer and Fall packaging/repackaging/Award notification/CCPG Waiver
   - Summer term starts June 13th
   - Initial Pell disbursement Summer – 6/6
   - Initial Pell disbursement Fall – 8/15

5. UPCOMING - System Updates:
   - Refresh of UAT – May 25th
   - End of PUM 25 testing in UAT – July 15th
   - PUM 25 applied to PRD – July 17th

6. ONGOING - BOG Waiver Reversal Plan:
   - Ken - Updated student listing to Roderick
   - Roderick - Set Var Char 1 to blank/delete row
   - Vu/Joyce – Tuition Calc and HEERF offset
   - Dave has updated the list of 2,380+ students to have their CCPG Waiver code removed: CCPG_LOAD_ERROR_SPRING_2022
   - Dave states: The query doesn't include high school students who received the code since they are not being charged tuition. If you want IT to remove the code for the High school students as well as part of the cleanup, let me know and I'll change the query to include them

7. ONGOING - Final stage for COA SEOG
   - 100+ with 'Suspend' process – SR with Oracle

8. ONGOING – Processing of BCC HEERF award
   - Requires final resolution of remaining students not disbursed

9. ONGOING - Working on new COA request to award $1.1M in HEERF III
   - Notify Dave before actual processing to allow for student communications

10.   ONGOING - Additional Items:
- PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships. The loan failed origination
- ATB/Citizenship/CIP Code Failures/Rejects
- Spring 22 SAP Disq/Warning notifications failed to be sent (some were sent)
- Spring 22 CCPG Disq/Warning notifications not sent
- LTHT Pell – Dave to review Tim's potential resolutions
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant
- Laney College request for query support
- Merritt College (Margie) request to help resolve student's disbursement error
- COA (Jackie) request to help resolve a student's Pell LEU/Aggregates in Campus Solutions
- Ken's request for Pell Grant List for Research Study: Pull the data for #'s 3-6
  1.   Between 18 to 65 years of age
  2.   Enrolled Fall 2021, Spring 2022, or Summer 2022
  3.   Completed a 2021-2022 FAFSA application (not in a rejected status)
  4.   Are Pell Grant eligible
  5.   Have an incomplete file (i.e. outstanding checklist requirements)
  6.   Not paid at all or for a given term (i.e. paid Fall 2021, but suspended for SAP for Spring 2022, or Pell Grant overpayment)

11.   ONGOING – Scheduling of the CCPG Waiver assignment
- Roderick is working with Dave to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled
- Dave states: Hi Roderick, I haven't had the time to validate. We may need to reassign this to as part of a workgroup as I don't think I can dedicate enough time solely to work on this project

12.   NEW - New FAFSA Verification Requirement Waivers for 2022-23

13.   NEW – FA District IT Project Update
- Ken states: do you have an hour to talk this afternoon or on Monday regarding the projects noted below from the 11/22/21 FA/IT APPS Meeting?

14.   NEW – Subsequent ISIRs not being loaded once packaged

Thanks, Richard

FA Processing Tuesday 5-24-22
Here's What's Going On:
1.   Huron Recap
- Tim/Huron has provided these value added inputs:

- o Initial determination that Pell originations were not part of the Mon/Wed disbursement processes for Laney
- o Determination that the budget build flag process (part of the FA Term/Budget build process) to avoid the Pell LTHT issue was there but the query prompt for one process were reversed
- o Provided the COD reconciliations and transmissions (Huron currently working with Laney College, but can continue under district contract; includes Pell setup changes to minimize later issues)
- Pell less-than half-time awarding errors
- ATB rejects
- Citizenship rejects
- R2T4 (on Laney contract; in talking with Dave the PeopleSoft functionality works, trouble is with the # of days HR assigned to Spring Break)
- SAP
- FISAP
- TD Client implementation
- CA processes (Cal Grant, Cal ISIR and CCPG)

2. Recommendations to fix the CIP Code issue for rejected students

3. Summer 2022 FA Term
- A SQL has been verified to set the Aid Year to 2022 for terms built as a 2023 header
- Terms built since 5/16 have summer as 2022 trailer
- On Thursday the SQL will be run in UAT for testing and then in PRD

4. Summer budgets
- Summer budgets will be run in UAT for review

5. Summer and Fall SAP and SAP Communications
- Roderick requested to setup JobSets for SAP – Summer and Spring
  - FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)
  - FA_SAP_PROCESS_FALL_ODD (AY 2023)
- Testing will take place in UAT

6. Summer and Fall packaging/repackaging/Award notification/CCPG Waiver
- Summer term starts June 13th
- Initial Pell disbursement Summer – 6/6
- Initial Pell disbursement Fall – 8/15

7. UPCOMING - System Updates:
- Refresh of UAT – May 25th
- End of PUM 25 testing in UAT – July 15th
- PUM 25 applied to PRD – July 17th

8. ONGOING - BOG Waiver Reversal Plan:
   - Dave created the query of students whose waiver is to be reversed
   - Roderick - Set Var Char 1 to blank/delete row
   - Vu/Joyce – Tuition Calc and HEERF offset
9. ONGOING - Working on new COA request to award $1.1M in HEERF III
   - Notify Dave before actual processing to allow for student communications

10. ONGOING - Additional Items:
    - Final stage for COA SEOG - 100+ with 'Suspend' process – Oracle asked for add'l documentation
    - BCC HEERF awarding - Requires resolution of remaining students not disbursed
    - PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships. The loan failed origination
    - ATB/Citizenship/CIP Code Failures/Rejects
    - LTHT Pell – Dave to review Tim's potential resolutions
    - Missing Information Letters – Review/revive past practice
    - COA request to load HEERF Grocery Grant
    - Laney College request for query support
    - Merritt College (Margie) request to help resolve student's disbursement error
    - COA (Jackie) request to help resolve a student's Pell LEU/Aggregates in Campus Solutions

11. ONGOING – Scheduling of the CCPG Waiver assignment
    - Roderick is working with Dave (and a proposed workgroup) to confirm the selection queries
    - Once confirmed, the CCPG waiver assignment can be scheduled

12. NEW - New FAFSA Verification Requirement Waivers for 2022-23

13. NEW – Subsequent ISIRs not being loaded once packaged

Thanks, Richard

FA Processing Wednesday 5-25-22
Here's What's Going On:
1. Huron Recap - Tim/Huron has provided these value added inputs:
   - Initial determination that Pell originations were not part of the Mon/Wed disbursement processes for Laney
   - Determination that the budget build flag process (part of the FA Term/Budget build process) to avoid the Pell LTHT issue was there but the query prompts for one process were reversed
   - Provided the query TDK_ATB_VALIDATION to identify 395 students where HS completion status <> ATB code in PSFT – Recommendation to add ATB codes by aid year - Will test in UAT after refresh
   - Identified the need to update the Credential Cross Reference table to prevent validation failures

2. Summer 2022 FA Term
   - A SQL has been verified to set the Aid Year to 2022 for terms built as a 2023 header
   - On Thursday the SQL will be run in UAT for testing and then in PRD
   - Terms built since 5/16 correctly have summer as 2022 trailer

3. Summer budgets
   - Summer budgets will be run in UAT for review

4. Summer and Fall SAP and SAP Communications
   - Roderick requested to setup JobSets for SAP – Summer and Spring
     - FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)
     - FA_SAP_PROCESS_FALL_ODD (AY 2023)
   - Testing will take place in UAT

5. Summer and Fall packaging/repackaging/Award notification/CCPG Waiver
   - Pls make the CCPG waiver a priority – Must be done before Pell disbursement
   - Summer term starts June 13th
   - Initial Pell disbursement Summer – 6/6
   - Initial Pell disbursement Fall – 8/15

6. UPCOMING - System Updates:
   - Refresh of UAT – May 25th
   - End of PUM 25 testing in UAT – July 15th
   - PUM 25 applied to PRD – July 17th

7. ONGOING - BOG Waiver Reversal Plan:
   - Dave created the query of students whose waiver is to be reversed
   - Roderick states: Per our FA Meeting this morning, before running the steps for the 2846 students in PROD, I will wait for Marla's confirmation that the Tuition Calculation step worked successfully in UAT
   - Are students communications being sent?
   - Roderick - Set Var Char 1 to blank/delete row
   - Vu/Joyce – Tuition Calc and HEERF offset

8. ONGOING - Working on new COA request to award $1.1M in HEERF III
   - Notify Dave before actual processing to allow for student communications

9. ONGOING - Additional Items:
   - Final stage for COA SEOG - 100+ with 'Suspend' process – Oracle asked for add'l documentation – Richard to provide
   - BCC HEERF awarding - Requires resolution of remaining students not disbursed

- Processing PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships. The loan failed origination
- ATB/Citizenship/CIP Code Failures/Rejects
- Missing Information Letters – Review/revive past practice
- COA request to load HEERF Grocery Grant
- Laney College request for query support
- Merritt College (Margie) request to help resolve student's disbursement error
- COA (Jackie) request to help resolve a student's Pell LEU/Aggregates in Campus Solutions

10. ONGOING – Scheduling of the CCPG Waiver assignment
- Roderick is working with Dave (and a proposed workgroup) to confirm the selection queries
- Once confirmed, the CCPG waiver assignment can be scheduled

11. NEW - New FAFSA Verification Requirement Waivers for 2022-23

12. NEW – Subsequent ISIRs not being loaded once packaged

Thanks, Richard

FA Processing Thursday 5-26-22
Here's What's Going On:
1. Huron Related:
- Identified the need to update the Credential Cross Reference table to prevent validation failures – On hold pending options impacting FA Ineligible Major checklist processing

2. Summer 2022 FA Term
- Roderick – Please now have Teresa run the SQL in UAT to set the Aid Year and Aid Year Calculated to 2022 for terms built as a 2023 header

3. Summer budgets
- Summer budgets will be run in UAT for review

4. Summer and Fall SAP and SAP Communications
- Roderick requested to setup JobSets for SAP – Summer and Spring
  - FA_SAP_PROCESS_SUMMER_EVEN (AY 2022)
  - FA_SAP_PROCESS_FALL_ODD (AY 2023)
- Testing will take place in UAT

5. Summer and Fall packaging/repackaging/Award notification/CCPG Waiver
- Pls make the CCPG waiver a priority – Must be done before Pell disbursement
- Summer term starts June 13th
- Initial Pell disbursement Summer – 6/6

- Initial Pell disbursement Fall – 8/15

6. UPCOMING - System Updates:
    - Refresh of UAT – May 25th - DONE
    - End of PUM 25 testing in UAT – July 15th
    - PUM 25 applied to PRD – July 17th

7. ONGOING - BOG Waiver Reversal Plan: ON HOLD PENDING OK FROM MARLA
    - Dave created the query of students whose waiver is to be reversed
    - Roderick states: Per our FA Meeting this morning, before running the steps for the 2846 students in PROD, I will wait for Marla's confirmation that the Tuition Calculation step worked successfully in UAT
    - Are student communications being sent?
    - Roderick - Set Var Char 1 to blank/delete row
    - Vu/Joyce – Tuition Calc and HEERF offset

8. ONGOING - Working on new COA request to award $1.1M in HEERF III
    - Notify Dave before actual processing to allow for student communications
    - Roderick – Please now stage everyone in PRD using EA/3 and provide Richard the trans #
    - Richard to disburse those who authorize in time for today's refunding
    - Dave to approve timing of disbursement????

9. ONGOING - Additional Items:
    - Final stage for COA SEOG - 100+ with 'Suspend' process – Oracle asked for add'l documentation – Richard provided screen shot requested
    - BCC HEERF awarding - Requires resolution of remaining students not disbursed
    - Processing PLUS Loan processing for BCC student – Teresa fixed the system allowing student/parent relationships. The loan failed origination
    - ATB/Citizenship/CIP Code Failures/Rejects
    - COA request to load HEERF Grocery Grant
    - Laney College request for query support
    - Merritt College (Margie) request to help resolve student's disbursement error
    - COA (Jackie) request to help resolve a student's Pell LEU/Aggregates in Campus Solutions
    - Missing Information Letters – Review/revive past practice

10. NEW - New FAFSA Verification Requirement Waivers for 2022-23

11. NEW – Subsequent ISIRs not being loaded once packaged

Thanks, Richard

FA Processing Tuesday 5-31-22
Here's What's Going On:
1. Summer processing:
- Summer term set as 2022 trailer
- Summer budgets are in PRD
- Colleges have queries to review budgets
- New students assigned SAP status MEET
- * Simulated SAP status for continuing students is required
- SAP communications will follow
- Summer packaging in simulation will follow (LTHT?)
- Award Ltr
- Summer repackaging
- BOG waiver applied?
- Pell disbursed June 6th – 6 days from now
  *Meeting needed to review simulated SAP results with colleges
2. ONGOING - COA request to award $1.1M in HEERF III
- Trans# 11095 has been loaded in UAT. Of the 1429 students staged:
- 870 Processed
- 1 Error - 619
- 334 Error - 601
- 224 Suspend

- The 300+ students w/ Error Code 601 are being awarded/disbursed this morning

Thanks, Richard

FA Processing Wednesday 6-1-22
Here's What's Going On:
1. Summer processing:
- Done -Summer term set as 2022 trailer
- Done -Summer budgets are in PRD
- Done -Colleges have queries to review budgets
- Done -New students assigned SAP status MEET
- Done -SAP status for continuing students
- Done -SAP communications – On hold
- Today - Summer packaging in simulation will follow (LTHT?)
- Award Ltr
- Summer repackaging
- BOG waiver – May be delayed
- Pell refund – Thursday June 9th – In 8 days

Thanks, Richard

FA Processing Thursday 6-2-22
Here's What's Going On:
1. Summer processing:
- Done -Summer term set as 2022 trailer
- Done -Summer budgets are in PRD
- Done -Colleges have queries to review budgets

- Done -New students assigned SAP status MEET
- Done -SAP status for continuing students
- Done -SAP communications – On hold
- Done - Summer packaging in simulation
- Next – Summer repackaging in simulation
- Next - Summer packaging live
- Award Ltr
- Upcoming - Summer repackaging (includes 2nd Pell)
- Upcoming – SAP communications
- BOG waiver – May be delayed
- Pell refund – Thursday June 9th – In 7 days

Thanks, Richard

FA Processing Friday 6-3-22
Here's What's Going On:

1. Summer processing:
- Done - Summer term set as 2022 trailer
- Done - Summer budgets are in PRD
- Done - Colleges have queries to review budgets
- Done - New students assigned SAP status MEET
- Done - SAP status for continuing students
- Done - SAP communications – On hold
- Done - Summer packaging in simulation
- Done - Summer repackaging in simulation
- Next - Summer packaging live
- Award Ltr
- Upcoming - Summer repackaging live (includes 2nd Pell)
- Upcoming – SAP communications – Wednesday June 8th
- BOG waiver – Timing
  Dave states: Hi Roderick, I looked over your query in this email and its similar to an old query that was written. Did you revise an old query? I think the old query was using dated rules so I wouldn't use that as a reference point.
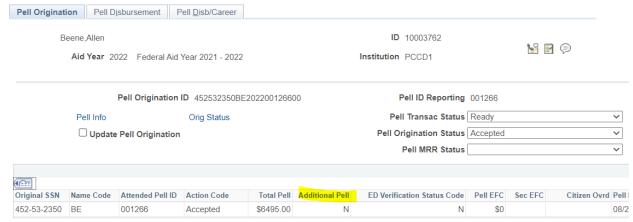 Can you write a new fresh query based on the new ccpg business requirements that I sent to the group? Also - Marla can Roderick work with the officers to help him validate results. Maybe Loan and Jackie can help validate.
- Pell refund – Thursday June 9th – In 7 days

2. Resolve repackaging selection issue – Students w/o summer term SAP are selected for repackaging
- Action – Richard to add criteria that requires a summer SAP status of Y, W or P

3. JobSet Requests:

Hi Roderick - Please setup the following JobSets in the priority order listed - Once set, I'll provide the run controls - Thanks, Richard
- FA SAP PROCESS - SUMMER EVEN (Mirror PCCFAB086 / PCCFA058)

- MASS PACKAGING - SUMMER EVEN (Mirror PCCFAB146 / PCCFA053)
- REPACKAGING - SUMMER EVEN (Mirror PCCFAB143 / PCCFA065)

4.   Discuss timing(after Auth/Disb) of Pell origination/disbursement outbound process and Additional Pell flag:

Pell Origination	Pell Disbursement	Pell Disb/Career

Beene,Allen   ID 10003762

Aid Year 2022   Federal Aid Year 2021 - 2022   **Institution** PCCD1

Pell Origination ID 452532350BE202200126600   **Pell ID Reporting** 001266

Pell Info   Orig Status   **Pell Transac Status** Ready

☐ Update Pell Origination   **Pell Origination Status** Accepted

Pell MRR Status

Original SSN	Name Code	Attended Pell ID	Action Code	Total Pell	Additional Pell	ED Verification Status Code	Pell EFC	Sec EFC	Citizen Ovrd	Pell
452-53-2350	BE	001266	Accepted	$6495.00	N	N	$0			08/2

Thanks, Richard

FA Processing Monday 6-6-22
Here's What's Going On:
1.   Summer processing:
- Done - Summer term set as 2022 trailer
- Done - Summer budgets are in PRD
- Done - Colleges have queries to review budgets
- Done - New students assigned SAP status MEET
- Done - SAP status for continuing students
- Done - SAP communications – On hold
- Done - Summer packaging in simulation
- Done - Summer repackaging in simulation
- Today – Run process to push NSLDS data to student's aggregates
  - Dave states: Thanks Richard! I think it would be best to run it for all students and schedule it to run daily to pick up any new students that come in from the ISIR.
  - The NSLDS Data Push process will be run in PRD today in advance of the summer Pell packaging/repackaging this week. The process will then be scheduled daily. The selection query is for students with a 2022 ISIR, official EFC and summer term 1223 FA Term.
- Decision – It's been decided to run summer packaging with LTHT students: Dave states: Based on the conversations from the other campuses and in speaking with Jennifer, we will move forward with running summer packaging for LTHT students and having staff manually fix the incorrect ones
- Next - Summer packaging live followed by Pell origination/disbursement outbound process and confirmation of the Additional Pell flag – Pending OK from FA Directors following the review of packaging simulation results
- Award letter

- Upcoming - Summer repackaging live (includes 2ⁿᵈ Pell) followed by Pell origination/disbursement outbound process and confirmation of the Additional Pell flag
    1. Pending OK from FA Directors following the review of repackaging simulation results
    2. Resolve repackaging selection issue – Students w/o summer term SAP are selected for repackaging
        - Dave states: I noticed students were packaged for summer in your simulation but have not been evaluated for SAP yet for summer. The reason they haven't been evaluated for SAP is because not all of their spring grades have been posted so we need to just wait until that happens. Can we make sure they are omitted from summer packaging until their SAP is ready to be evaluated? Below are some examples from your run
        - Action – Richard to add criteria that requires a summer SAP status of Y, W, or P
- Upcoming – SAP communications – Wednesday June 8th
- BOG waiver – Timing
    - Dave states: Hi Roderick, I looked over your query in this email and its similar to an old query that was written. Did you revise an old query? I think the old query was using dated rules so I wouldn't use that as a reference point. Can you write a new fresh query based on the new CCPG business requirements that I sent to the group? Also - Marla can Roderick work with the officers to help him validate results. Maybe Loan and Jackie can help validate.
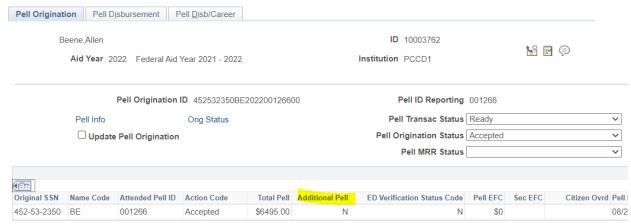   -
    Eligibility Criteria

        - Current Residency is not OS or INTL
        - Has either an 2021-2022 FED ISIR or CA ISIR on file with EFC less than (note: this is for 2021-2022; the number will change every year and PS setup needs to be adjusted every year)
        o Dependent at home EFC less than 19,716
        o Dependent away from home EFC less than 30,644
        o Independent EFC less than 30,644
        - CCPG Loss last Evaluation term has to have a final value of:
        o MEET
        o WARNING
        o PROBATION
        - Include any student whose CCPG loss evaluation DOES NOT EXIST. That means the student is brand new to Peralta.
        - Include any student whose CCPG loss evaluation does not exist for the two latest primary terms i.e
        o Student enrolled for term spring 2022 is eligible if they did not enroll in the LAST two primary terms (Fall 2021 & Spring 2021)
        o Student enrolled for term Fall 2021 is eligible for CCPG for that term if they did not enroll in the LAST two primary terms (Spring 2021 & Fall 2020)

    o Student enrolled for term Summer 2021 is eligible for CCPG for that term if they did not enroll in the LAST two primary terms (Spring 2021 & Fall 2020)

- Pell refund – Thursday June 9th – In 3 days

2. Loan has requested the go ahead to process summer loans. Richard to 1st check setup

3. JobSet Requests:

Hi Roderick - Please setup the following JobSets in the priority order listed - Once set, I'll provide the run controls - Thanks, Richard

- FA SAP PROCESS - SUMMER EVEN (Mirror PCCFAB086 / PCCFA058)
- MASS PACKAGING - SUMMER EVEN (Mirror PCCFAB146 / PCCFA053)
- REPACKAGING - SUMMER EVEN (Mirror PCCFAB143 / PCCFA065)

4. Discuss timing(after Auth/Disb) of Pell origination/disbursement outbound process and Additional Pell flag:

Pell Origination	Pell Disbursement	Pell Disb/Career

Beene,Allen   **ID** 10003762

Aid Year 2022   Federal Aid Year 2021 - 2022   **Institution** PCCD1

Pell Origination ID 452532350BE202200126600   **Pell ID Reporting** 001266

Pell Info   Orig Status   **Pell Transac Status** Ready

☐ Update Pell Origination   **Pell Origination Status** Accepted

   Pell MRR Status

Original SSN	Name Code	Attended Pell ID	Action Code	Total Pell	Additional Pell	ED Verification Status Code	Pell EFC	Sec EFC	Citizen Ovrd	Pell
452-53-2350	BE	001266	Accepted	$6495.00	N	N	$0			08/2

Thanks, Richard

FA Processing Thursday 6-9-22
Here's What's Going On:

1. Summer Processing Update:

- The Pell Origination and Disbursement expected to run yesterday (Wednesday) at 2:30PM as regularly scheduled apparently was manually cancelled/deleted. It was manually run at 9:00PM last night.

Hi Roderick - The PCCFA092 Job scheduled for today, Wednesday June 8th at 2:30PM, does not appear to have been run. The Schedule JobSet Requests has the Run Status of Delete - Please confirm its status. - Thanks, Richard

- Colleges should have files this morning to send to COD. The Additional Pell flag is Y:

- Process SAP communications has been limited to checklists and User Edit Messages pending resolution of the SAP Disq and Warn templates

- This morning (Thursday)Thursday morning:
  - Run summer SAP for new and continuing students
  - Process SAP communications (with exception of Disq/Warn emails)
  - Run summer packaging – Failed – Student with 'multiple rows' need to be identified and marked 'Invalid for Packaging'
    1. Roderick to provide a script to identify invalid students:
    Hi Roderick - Summer mass packaging assignment continues to error due to students with multiple rows (such as admit terms).
    Please, as a top priority, complete the script to identify selected students with multiple rows to be marked 'Invalid for Packaging' and enable summer packaging to continue - Thanks, Richard
    2. Analysis and upfront fix of students with 'multiple rows' is required to continue with scheduled mass packaging
  - Run repackaging – This will happen after packaging is successful
  - Award authorization and disbursement – Dependent on packaging/repackaging completion
  - SF group post and refund – Targeted for 2:00PM

2. JobSet Requests:
Roderick has setup the following JobSets. Richard to confirm and test prior to scheduling:
  - FA SAP PROCESS - SUMMER EVEN
  - MASS PACKAGING - SUMMER EVEN
  - REPACKAGING - SUMMER EVEN
3. Loan has requested the go ahead to process summer loans. Richard to 1st check setup

Thanks, Richard

FA Processing Friday 6-10-22
Here's What's Going On:
  1. Summer Processing Recap:
  - Summer awarding was completed in time for Thursday's refunding

- The related Pell origination COD files were accepted with the correct Additional Pell flag of Y
- The SAP communication Checklist and User Edit Messages were successfully applied
- The SAP communication Disqualification and Warning emails have not yet been sent pending revised template files. A request has been made to Charin for assistance with the templates
- For reasons not yet determined, certain students caused the packaging assign process to fail due to multiple rows (such as multiple admits). Roderick is going to create a script to identify future students to be manually marked invalid for packaging. This is a temporary fix to allow for ongoing manual packaging
- Richard to confirm and request activation of the summer JobSets to be run daily
- Richard to respond to Loan's request to review adjusted awards zeroed out
- Richard to review request to remove SAP due dates that often conflict with college SAP appeal deadlines

Thanks, Richard

FA Processing Tuesday 6-14-22
Here's What's Going On:
1. Pell response files – Loaded via scheduled process? Or will these be done by Roderick on Thursday?
   - Peter states: The Pell response file for 2020/2021 has been came back and placed insider Import folder for ready to load into CS
   - Tim states: I am getting caught up now that I'm back from my week off. Checking in on this one, it does not appear the response file has been loaded to CS. Richard, Roderick, can you confirm?
   - Richard states: Hi Roderick - Upon your return Thursday 6/16, please confirm if the Pell response file referred to below has been loaded into CS - Thanks, Richard

2. Summer Processing – Richard must run manually until Thursday when Roderick can update the scheduled JobSet run controls
   - Summer Packaging – Assign process runs to error – This must wait until Thursday when Roderick can run the script to identify the student IDs causing the failures. For reasons not yet determined, certain students caused the packaging assign process to fail due to multiple rows (such as multiple admits). Roderick is going to create a script to identify future students to be manually marked invalid for packaging. This is a temporary fix to allow for ongoing manual packaging
3. Summer Processing Recap:
   - The SAP communication Disqualification and Warning emails were sent yesterday with the assistance of Charin
   - Summer SAP and Repackaging were run manually yesterday
   - Richard to respond to Loan's request to review adjusted awards zeroed out
   - Richard to review request to remove SAP due dates that often conflict with college SAP appeal deadlines
4. Oracle responded to the SR regarding students in Suspended status:

- Hi Rod, so in reviewing, 'CBL_FAPPKEAL_8107543.log', there are many students who have the following message written in the log: Error: MULTIPLE AGGR LEVELS FOR SAME CAREER & ITEM TYPE. Please read the following KM for steps to resolve the issue for the students impacted: 2827249.1 - External Award Load Records End in Suspend Status with Message Multiple Aggregate Levels For Same Career/Item Type
- Based on the 2827249.1 document from Oracle, the issue is caused when the student, awarded for fall/spring, has different aggregate levels between terms. For example, aggregate year 1 in fall and year 2 in spring
- The proposed solution will be tested by Roderick and Richard upon Roderick's return

5. CIP Codes
- Tim states: FAPELLDV_LANEY_TK - FAPELLDV_LANEY_TK_CIP returns students with error code 204 – Incorrect CIP Code - and it also returns their Academic Plan from FA Term for the term of the reject. This only returned 7 plans for 28 disbursements. Of those 7 plans, these 6 were not in the table. Please add them so the Pell Outbound process can pick them up. Naturally, if any of these is not FA-eligible, you'll want to remove their awards instead: LAASOC824, LCCTRA392E, LCCTRA392M, LUM111E, LUM111M, MCPCHD338M
- Ken – Please consider working with Amany to discuss the addition of the plans. It seems Amany controls the plan table

Thanks, Richard

FA Processing Wednesday 6-15-22
Here's What's Going On:
1. Pell response files – Roderick will load the Loaded via scheduled process? Or will these be done by Roderick on Thursday?
- Peter states: The Pell response file for 2020/2021 has been came back and placed insider Import folder for ready to load into CS
- Tim states: I am getting caught up now that I'm back from my week off. Checking in on this one, it does not appear the response file has been loaded to CS. Richard, Roderick, can you confirm?
- Richard states: Hi Roderick - Upon your return Thursday 6/16, please confirm if the Pell response file referred to below has been loaded into CS - Thanks, Richard

2. Summer Processing – Richard must run manually until Thursday when Roderick can update the scheduled JobSet run controls
- Summer Packaging – Assign process runs to error – This must wait until Thursday when Roderick can run the script to identify the student IDs causing the failures. For reasons not yet determined, certain students caused the packaging assign process to fail due to multiple rows (such as multiple admits). Roderick is going to create a script to identify future students to be manually marked invalid for packaging. This is a temporary fix to allow for ongoing manual packaging
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    - Based on the 2827249.1 document from Oracle, the issue is caused when the student, awarded for fall/spring, has different aggregate levels between terms. For example, aggregate year 1 in fall and year 2 in spring
    - The proposed solution will be tested by Roderick and Richard upon Roderick's return
5. CIP Codes
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    - Ken – Please consider working with Amany to discuss the addition of the plans. It seems Amany controls the plan table

Thanks, Richard

FA Processing Thursday 6-16-22
Here's What's Going On:
1. Pell response file not loaded to CS
    - The Pell response file for 20/21 came back and was placed inside the import folder, ready to load into CS – But has not been loaded to CS
    - The Document ID of the file that was sent on 6/2 and its response file that was received on 6/3 (but not loaded into CS) is 2022-06-02T13:13:57.7101972307 – It contains 25 students
    - Action - Roderick to manually load the file
    - Question - Should this file been loaded by a scheduled process?
2. Summer Processing
    - Richard and Roderick to update the summer JobSet run controls
        1. There is 1 run control to change PCCFAB168, then activate
        2. There are no run control changes to PCCFAB173. Activate after 168
        3. There are no run control changes to PCCFAB174. Activate after 173
    - Summer Packaging – Assign process runs to error – Roderick to run the script to identify the student IDs causing the failures. For reasons not yet determined, certain students caused the packaging assign process to fail due to multiple rows (such as multiple admits). Roderick is going to create a script to identify future students to be manually marked invalid for packaging. This is a temporary fix to allow for ongoing manual packaging

- • This lists the 9 students with multiple rows: Many of which were marked invalid in prior packaging

10744944

10844464

10853627

10918413

10925424

10931192

10959126

10967947

10978146

- • Dave identified 5+ new students with SAP status of undetermined. Richard provided a query to identify students to manually calc SAP or override the SAP status. Dave mentioned to check the SAP setup for eligible programs – Will do
- • Jennifer identified 2 students that were not packaged by summer packaging. Richard requests: Pls identify students in question prior to manual packaging to allow for analysis as to why they failed mass packaging
- • Richard to respond to Loan's requests to review adjusted awards zeroed out
- • Richard to review request to remove SAP checklist due dates as they often conflict with college SAP appeal deadlines

3. Oracle responded to the SR regarding students in Suspended status:

- • Hi Rod, so in reviewing, 'CBL_FAPPKEAL_8107543.log', there are many students who have the following message written in the log: Error: MULTIPLE AGGR LEVELS FOR SAME CAREER & ITEM TYPE. Please read the following KM for steps to resolve the issue for the students impacted: 2827249.1 - External Award Load Records End in Suspend Status with Message Multiple Aggregate Levels For Same Career/Item Type
- • Based on the 2827249.1 document from Oracle, the issue is caused when the student, awarded for fall/spring, has different aggregate levels between terms. For example, aggregate year 1 in fall and year 2 in spring
- • The proposed solution will be tested by Roderick and Richard

4. CIP Codes

- • Tim states: FAPELLDV_LANEY_TK - FAPELLDV_LANEY_TK_CIP returns students with error code 204 – Incorrect CIP Code - and it also returns their Academic Plan from FA Term for the term of the reject. This only returned 7 plans for 28 disbursements. Of those 7 plans, these 6 were not in the table. Please add them so the Pell Outbound process can pick them up. Naturally, if any of these is not FA-eligible, you'll want to remove their awards instead: LAASOC824, LCCTRA392E, LCCTRA392M, LUM111E, LUM111M, MCPCHD338M
- • After review, please consider working with Amany to discuss the possible addition of the plans. It seems Amany controls the plan table
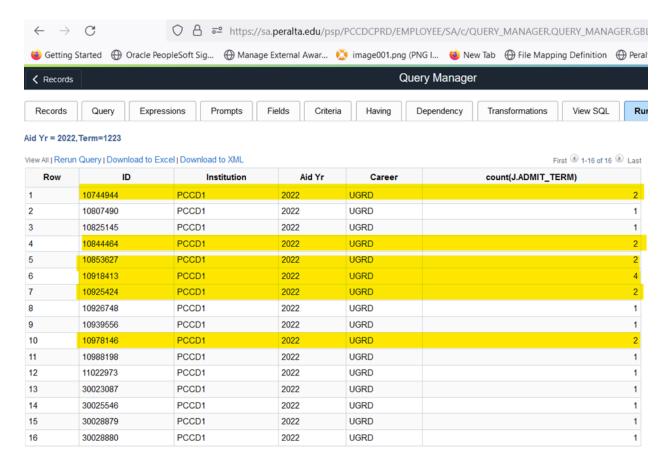
Thanks, Richard

FA Processing Tuesday 6-21-22

Here's What's Going On:

1. ATB Processing – Discuss Tim's proposal:
- • Review purpose of revisions:

1. Assign ATB code by aid year
2. Discuss ATB mismatch – Query TDK_ATB_VALIDATION
   - AY 2022 = 402 (many have ISIR of 'Other' and CS as HSD which seems ok)
   - AY 2023 = 245
3. Discuss impact of updating the ATB JobSet now with the new run controls

2. CIP Codes
   - Tim states: FAPELLDV_LANEY_TK - FAPELLDV_LANEY_TK_CIP returns students with error code 204 – Incorrect CIP Code - and it also returns their Academic Plan from FA Term for the term of the reject. This only returned 7 plans for 28 disbursements. Of those 7 plans, these 6 were not in the table. Please add them so the Pell Outbound process can pick them up. Naturally, if any of these is not FA-eligible, you'll want to remove their awards instead: LAASOC824, LCCTRA392E, LCCTRA392M, LUM111E, LUM111M, MCPCHD338M
   - Amanda/Ken - After review, please consider working with Amany to discuss the possible addition of the plans. Amany manages the plan table

3. Summer Processing
   - Richard and Roderick have updated the summer JobSets which are now running daily
   - The mass packaging process required a workaround to not select students with multiple rows. This allows the Job to run to success. However, the students with multiple rows (possibly multiple admit terms) are not packaged
   - In order to get to the source of the problem, Amanda/Ken – Will you please try to determine why the highlighted students have multiple rows?

- Richard to review Loan's requests to review adjusted awards zeroed out
- Richard to review request to remove SAP checklist due dates as they often conflict with college SAP appeal deadlines

4. Oracle responded to the SR regarding students in Suspended status:
- It seems the error: MULTIPLE AGGR LEVELS FOR SAME CAREER & ITEM TYPE is caused when a student, awarded for fall/spring, has different aggregate levels between terms. For example, aggregate year 1 in fall and year 2 in spring
- Roderick – Please read the following KM for steps to resolve the issue for the students impacted: 2827249.1 - External Award Load Records End in Suspend Status with Message Multiple Aggregate Levels for Same Career/Item Type
- The proposed solution will be tested by Roderick and Richard

5. Aid Year 2023 Fall/Spring Processing
- Roderick – Please setup the following JobSets for ODD (for aid year 2023):
    1. FA SAP PROCESS – FALL ODD – Start with PCCFAB096/PCCFA058 which is FA SAP Process - Fall EVEN and set up a new JobSet called FA SAP PROCESS – FALL ODD
    2. MASS PACKAGING – FALL SPR ODD – Take PCCFAB134/PCCFA053 – Change the description from Mass Packaging - Pop Updt ODD to MASS PACKAGING - FALL SPR ODD and setup run controls for aid year 2023
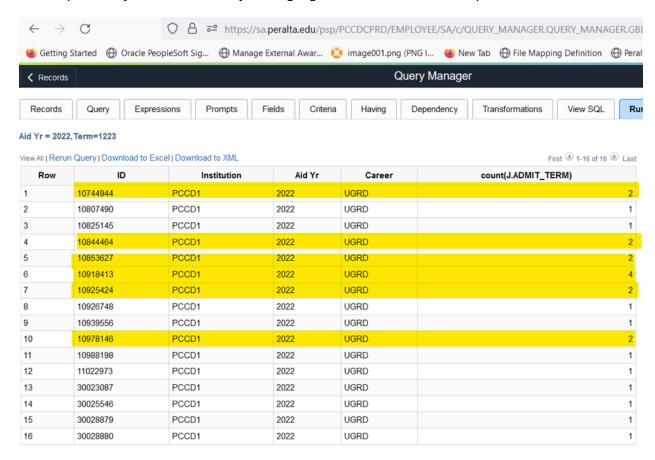
3. ==REPACKAGING ODD== – Take PCCFAB107/PCCFA065 which is Repackaging-PopUpdt/Email ODD – Change the description to REPACKAGING ODD and setup with run controls for aid year 2023
- Fall SAP and SAP Communications – Summer 2022 term ends 8-4-22
    1. New students/Continuing students
    2. Update letter templates
- Fall/Spring mass packaging
    1. Confirm SEOG amounts
    2. COA = Min 1/Max 500 All others = 600/600
- Fall 2022 term (1224) starts 8-22-22
- 1st Pell disbursement 8-15-22

6. PUM Testing
- PUM 25 testing in UAT begins 7-5-22 and ends 7-15-22

Thanks, Richard

FA Processing Wednesday 6-22-22
Here's What's Going On:

1. New Items:
- Hi Director Ma, I couldn't find out where it goes wrong with this student's loan. COD has accepted this student's loan file but PS did not disburse the loan amount and no errors on the CIP code. Please let me know what to do for this student's Spring loan
- Hello Richard and Ken, Can we discuss the following issues during tomorrow's FA processing call? Additionally, we also came across other students (discovered by Peter), where the Summer Packager is zeroing out the FA and SP awards when packaging the student summer Pell. I believe this is similar to the issue that BCC just reported this past Thursday. There must be more students negatively impacted by this in summer for all colleges. How can we best identify all these students so we can get this rectified? I look forward to discussing possible solutions tomorrow. Thank you. Sincerely, Jennifer Ma
- Ken: Looking at the first student: Wing Lin: Student was awarded/completed on Career "0". in 2016. Student was, thereafter, brought back, under Career "1" and has since been discontinued (due to no enrollment) and brought back due to re-applying, which will give a new Admit Term. Students that are discontinued and re-apply will always have a new Admit Term, until they complete the program. Please let me know if the above doesn't clear up any confusion as to why a student may have multiple Admit Terms?

2. ATB Processing – Discuss Tim's proposal:
- Review purpose of revisions:
    1. Assign ATB code by aid year
    2. Discuss ATB mismatch – Query TDK_ATB_VALIDATION
        - AY 2022 = 402 (many have ISIR of 'Other' and CS as HSD which seems ok)
        - AY 2023 = 245
    3. Discuss impact of updating the ATB JobSet now with the new run controls

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- Richard and Roderick have updated the summer JobSets which are now running daily
- The mass packaging process required a workaround to not select students with multiple rows. This allows the Job to run to success. However, the students with multiple rows (possibly multiple admit terms) are not packaged
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Aid Yr = 2022, Term=1223

View All | Rerun Query | Download to Excel | Download to XML First 1-16 of 16 Last

Row	ID	Institution	Aid Yr	Career	count(J.ADMIT_TERM)
1	10744944	PCCD1	2022	UGRD	2
2	10807490	PCCD1	2022	UGRD	1
3	10825145	PCCD1	2022	UGRD	1
4	10844464	PCCD1	2022	UGRD	2
5	10853627	PCCD1	2022	UGRD	2
6	10918413	PCCD1	2022	UGRD	4
7	10925424	PCCD1	2022	UGRD	2
8	10926748	PCCD1	2022	UGRD	1
9	10939556	PCCD1	2022	UGRD	1
10	10978146	PCCD1	2022	UGRD	2
11	10988198	PCCD1	2022	UGRD	1
12	11022973	PCCD1	2022	UGRD	1
13	30023087	PCCD1	2022	UGRD	1
14	30025546	PCCD1	2022	UGRD	1
15	30028879	PCCD1	2022	UGRD	1
16	30028880	PCCD1	2022	UGRD	1

- Richard to review Loan's requests to review adjusted awards zeroed out
- Richard to review request to remove SAP checklist due dates as they often conflict with college SAP appeal deadlines

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- Fall 2022 term (1224) starts 8-22-22
- 1st Pell disbursement 8-15-22
7. PUM Testing
- PUM 25 testing in UAT begins 7-5-22 and ends 7-15-22

Thanks, Richard

FA Processing Monday 6-23-22
Here's What's Going On:
1. Susan/Jennifer from Laney raised the issue that the F23V5 checklist was not assigned as expected. It was determined an incorrect setup (update box was checked) of the event definition prevented the assignment. This has been fixed and many F23V5 checklists were assigned

2. Summer term begins today 6/13

3. Summer Processing Recap:
- Summer awarding was completed in time for last Thursday's refunding
- The related Pell origination COD files were accepted with the correct Additional Pell flag of Y
- The SAP communication Checklist and User Edit Messages were successfully applied
- The SAP communication Disqualification and Warning emails have not yet been sent pending revised template files. Richard and Charin to resolve today. There are 2,000 Disq and 125 Warn emails to be sent ASAP
- For reasons not yet determined, certain students caused the packaging assign process to fail due to multiple rows (such as multiple admits). Roderick is

going to create a script to identify future students to be manually marked invalid for packaging. This is a temporary fix to allow for ongoing manual packaging
- Richard to confirm and request activation of the summer JobSets to be run daily – This is expected to happen on Thursday 6/16 when Roderick returns
- Richard to respond to Loan's request to review adjusted awards zeroed out
- Richard to review request to remove SAP due dates that often conflict with college SAP appeal deadlines

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