

2.12 Weekly financial aid meeting with consultants

PCCD Financial Aid Meeting
May 2021 – August 2021
9:30 – 10:30

Goals:

- **Collaborate about process**
 - **Discuss policies and procedures**
 - **Ensure we are following all federal/state compliance requirements**
 - **Identify areas of improvement**
 - **Share ideas for enhancing the financial aid process**
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Agenda May 6, 2021

1. Consultant's updates
 2. New Aid Year Set-up
 - a. 2021-2022 ISIRS
 - b. CCPG Waivers
 3. SAP run for Spring, summer and fall
 4. Structure for escalating issues that would go to the District Analysts
 5. Award automation
 - a. HEERF II funding awarding
 - b. State Emergency grant awarding
 6. Audit finding review
 7. 2021-2022 Cost of Attendance Review
 8. IFAP updates – All
 9. Open Discussion – All
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Agenda May 27, 2021

1. Weekly student disbursement process/SF Journals Website update - **Marla**
2. Analyst Interviews - **Marla**
3. Website Updates – **Amanda and Marla**
 - a. Financial Aid Home page contact information
 - b. How to request IRS verification of Non-filing letter
 - c. Documents and Forms
 - d. How to apply for Financial Aid (example given on web page was 2015-2016)

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- e. Financial Aid Disbursement
 - f. California Promise Grant
 - g. Student Loans
 - h. Consumer Information
 - i. Financial Aid Meeting Minutes (example given on web page was 2015-2016)
 - j. PCCD Student Financial Aid Handbook 2020-2021 (showed on web page PCCD Financial Aid Policies and Procedures Manual)- Does anyone have FA Handbook?
4. Student Jenea Clay attached was transmitted on 03/25/2021, but not originated - **Hemanth**
 5. DL Response File Rejected in PS for Dieu Thuy Mac 10945692 - **Hemanth**
 6. Unsub Loan award for one of our students (**Bat-erdene, Shurentsetseg- 10973431**) Rejected - **Hemanth**
 7. 2021-2022 ISIR Load Update
 8. 2021-2022 Packaging
 - a. What's needed to begin packaging
 - b. Anticipated date for packaging
 9. Consultants Updates
 10. Audit Updates
 11. IFAP updates – All
 12. Open Discussion – All
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Agenda June 3, 2021

1. Summer Packaging Status – All
2. Satisfactory Academic Progress (SAP) run for Spring 2021- All
3. Upload to PCCD website completion Status - Amanda
 - a. Fin Aid Home Page contact info
 - b. FA Disbursement Dates 2021-2022
 - c. Documents and Forms 2021-2022
 - d. Pending to upload to PCCD website by IT for Cost of Attendance 2021-2022
4. 2021-2022 ISIR Load Update - Richard
 - a. CCPG waivers
5. 2021-2022 Packaging Updates - Richard
6. Consultants Updates

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7. Audit Updates
8. IFAP updates – All
9. Open Discussion – All

Parking Lot Items:

- i. Reconciliation Process
- ii. Stale check process
- iii. We need to solidify a process that includes the business office; so financial aid office, business office and who from finance to meet
- iv. Will make one of our meetings a combined CBO meeting for all of us.

Agenda June 10, 2021

1. Satisfactory Academic Progress (SAP) run for Spring 2021- Richard
 - a. Checklist status
 - b. Letter status
2. Summer Packaging – Richard
 - a. Summer checklist
 - b. CCPG waivers
 - c. Communication to students from District
3. 2021-2022 ISIR Load Update - Richard
 - a. Cal ISIRS
4. 2021-2022 Packaging Updates – Richard
 - a. FA term for spring
5. Expanding bi-weekly meetings to include campus business office - Marla
 - a. (Beginning next Thursday) *
6. Finalizing weekly award payment schedule – Marla
7. Collaboration on Student Financial Aid Handbook – Marla
8. CampusLogic - Consultants
9. Audit Updates – Marla and MoMo
 - a. Standardized reports that can be run for audit requests
10. IFAP updates – All
 - a. FISAP – review changes
 - b. Technical reference: do we need it
11. Open Discussion – All

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Parking Lot Items:

- i. Reconciliation Process
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Agenda June 24, 2021

12. Update on HEERF awards – Hemanth
13. Summer Packaging – Richard
14. 2021-2022 Packaging Updates – Richard
15. Fraudulent Student Issues - Marla
16. Audit Updates – Marla and MoMo
 - a. Extensions
17. IFAP updates – All
 - a. FAFSA Simplification Act and the early implementation of the Removal of Requirements for Title IV Eligibility Related to Selective Service Registration and Drug-Related Convictions
 - b. Repeal of the William D. Ford Federal Direct Loan Program Subsidized Usage Limit Restriction
18. Next meeting with CBOs
19. Open Discussion – All

Parking Lot Items:

- i. Reconciliation Process
 - ii. Stale check process
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Agenda July 1, 2021

1. Loan rejects – Hemanth
2. Award Disbursement Report – Hemanth
3. Cal Grant roster – Hemanth

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4. Summer Packaging – Richard
5. 2021-2022 Packaging Updates – Richard
6. Possible fraudulent students - Marla
7. Authorization exceptions - Marla
8. New MSI fund set-up and disbursement - Angie
9. FISAP report preparation - Angie
10. IFAP updates – All
11. Open Discussion – All

Parking Lot Items:

- v. Reconciliation Process
- vi. Stale check process
- vii. Summer packaging; request have a flag for students who have received Pell at another school; in the past there was an NSLDS flag; will run it next week at the latest

Agenda July 8, 2021

12. Campus Logic Mod Update – Richard
13. 2021-2022 Fall and Spring Packaging – Richard
14. Summer Packaging – Richard
15. BOG Loss Eval for Spring 2021 – Richard/Loan
16. Loan rejects Update – Hemanth
17. Award Disbursement Report Update – Hemanth
18. Cal Grant roster update – Hemanth
19. SEOG – Hemanth
20. Pell Disbursement not being captured in COD -Angie
21. New MSI fund set-up and disbursement – Angie
 - a. Have the forms by next week
22. FISAP report preparation – Angie
 - a. Will receive the support for these reports
 - b. Couple more weeks out for this information

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23. Audit Updates

24. Meeting with CBOs next week

25. IFAP updates – All

26. Open Discussion – All

Parking Lot Items:

- viii. Reconciliation Process
- ix. Stale check process
- x. FISAP reporting

Action Items:

* Loan and Pell reject report

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

Agenda July 29, 2021

1. Pell Outbound process for aid year 2022 – Richard
2. 2021-2022 Fall and Spring Packaging Updates – Richard
3. Summer Packaging – Richard
4. BOG Loss Eval for Spring 2021 – Richard/Loan
5. 2020-2021 Close out – Loan
6. Pell and Loan origination records – Jennifer
7. Fraudulent Students – Angie
8. CCPG application and CCC apply - Angie
9. Loan rejects Update – Hemanth
10. Award Disbursement Report Update – Hemanth
11. Cal Grant roster update – Hemanth
12. Audit Updates
13. IFAP updates – All
14. Open Discussion – All

Parking Lot Items:

- xi. Reconciliation Process
- xii. Stale check process

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xiii. FISAP reporting

Action Items:

* Loan and Pell reject report

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

Agenda August 5, 2021

15. 2021-2022 Packaging Updates – Richard/Hemanth

a. CCPG mass packaging/automation

b. The origination will go ahead and be sent to COD and if there are any rejects we can work on that. Will work with Roderick.

16. Other Consultant Updates – Richard/Hemanth/Amanda

17. Campus Logic – Richard

18. BOG Loss Eval for Spring 2021 – Richard/Loan

19. Fraudulent Students – Angie

a. Follow-up with Marla about the OIG piece of it

20. FISAP

a. Reports from FA analysts

21. IFAP updates – All

22. Open Discussion – All

Parking Lot Items:

xiv. Reconciliation Process

xv. Stale check process

Action Items:

* Loan and Pell reject report

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