

## 2.13 Financial Aid Processing Meetings May Details

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**FA Processing 5-3-2021**

Attendees: Roderick, Hemanth, Richard, Marla

Discussion Points:

The purpose of this meeting is to discuss the FA processing requirements going forward through the Fall term of 2021

- Objective - Maintain and continue FA processing for Spring (1212) and Summer (1213) 2021

Term 1212 2021 Spring

\*Description   
 Short Description   
 \*Term Category   
 \*Term Begin Date   \*Ending Date

Term 1213 2021 Summer

\*Description   
 Short Description   
 \*Term Category   
 \*Term Begin Date   \*Ending Date

List concerns/requirements for the remaining Spring and Summer terms for 2020 such as summer awarding/packaging, Pell and Loan processing, communications, support for colleges

- Objective – Load 21/22 ISIRs in PRD and begin verification for the Fall term 2021 (1214), correct ISIRs and send corrections to CPS

Term 1214 2021 Fall

\*Description   
 Short Description   
 \*Term Category   
 \*Term Begin Date   \*Ending Date  

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3. Strategy – Confirm - Table setup (including the Aid Year Rollover) be completed in UAT and then migrated to PRD? This will include the checklists and aid year specific comments along with updates to the RTF letter templates and queries
4. We need PUM 20 applied to PRD that was released on 2/10/21. This is required to load 21/22 ISIRs and call the INAS calc and set ISIR home campus. Discuss what it's going to take to get PUM applied to PRD. Is PUM 20 in UAT now?
5. Access to FABATCH – Need provisioning to sign in as FABATCH to see run controls
6. Make sure – No refresh of UAT
7. Need processing dates and COA budgets from colleges – Produce 'Date Matrix' Excel worksheet highlighting key dates. Also, we need the college budgets
8. Review the summary of information requests to College FA Directors/Officers release by Eugene
9. Cal ISIR (Dreamer) setup/testing
10. Where are letter templates saved?
11. Packaging Plans consist of Fall Only, Fall Spring, Summer Only and Spring Only. Confirm – Only Pell and SEOG are auto packaged for Fall and Spring. Just Pell for Summer? Discuss other awarding such as loans and work study. Are these awarded manually by the colleges? Discuss use of Packaging Variables – BOG variables – Customizations for Cal Grant, Promise Grant
12. Need 'Communication Matrix' to know what communications are sent when
13. Why does BCC have a 2<sup>nd</sup> school code for NSLDS use?
14. Summer 2020 and before was non-standard. Summer 2021 and 2022 is set as academic – Why the change?
15. Shopping Sheet – Update Logos
16. Uploading in the OCI – Eugene emailed to mention: Use Unix which is case sensitive (Teresa is up on this) – There was a plan to work on some views which might make query easier

**FA Processing 5-5-21**

## Discussion Topics:

1. We need to get the first AY22 ISIR file from each college for testing the ISIR Load process. Who can do this and where will the files be placed?
2. Dick to set up the ISIR Global Options to Call INAS
3. Then we need to test loading the ISIRs in UAT
4. Status of new year checklists – Roderick has added the 80 F22 checklists to UAT – What is the game plan to replace the 2020-21 in the descriptions with 2021-22?
5. Dick will set up the Checklist Items, Function Table, 3C Groups and 3C Event Definitions and Run Controls
6. Roderick will set up the Jobs to assign the checklists
7. Roderick will determine what's needed to test the Campus Logic file
8. Hemanth has been requested to sequence the active Com Gen jobs with emphasis on those supporting ISIR loads, checklists, and verification. This will let us know what letter templates to update and test first
9. Discuss Marla's request regarding: Urgent Issue FAO Reconciliation Errors
10. Discuss tomorrow's FA Director's Meeting – See the Topic Status for the NEW Year Setup below:

5-6-21

FA Director's Meeting

Topic Status:

**1. New Year Set-up**

Where are we with this process?

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

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

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

What is the timeline to get this set-up?

- The best case is the week of May 17<sup>th</sup> to begin loading ISIRs

### 1. SAP run 3. CCPG Waivers (2021-2022) 4. Award Automation

#### FA Processing 5-6-21

##### Discussion Topics:

- ~~1. All 80 2021-22 Checklist Items (F22) and related descriptions/comments have been setup in UAT – Migration to PRD has been requested~~
2. Next:
  - ~~a. Add the 80 F22 checklists to the Checklist Function table – Migration to PRD has been requested~~
  - ~~b. Build the Checklist table for the 80 F22 checklists – Migration to PRD has been requested~~
  - ~~c. Setup the 3C Groups for the 80 F22 checklists – Migration to PRD has been requested~~
  - d. Build 160 Event Definitions required to 'assign' and 'complete' the F22 checklist codes - Richard
  - e. Setup the Event 3C Groups for the Event Definitions - Richard
  - f. Setup the 160 3C Engine run controls - Richard
  - g. Setup Jobs to assign and complete the checklist codes – Roderick
3. Identify and update the initial communication templates
  - a. FAFSA Thank You Even
  - b. Financial Aid Award Email Even
4. Discuss Cal ISIRs, Campus Logic, ISIR home Campus process (in what order is this run?)
5. Run control strategy – Our jobs are built to run many processes. For example, one JobSet contains:
  - ISIR Home Campus
  - ISIR Inbound
  - Check List Assignment
  - ATB
  - NSLDS
  - Edit Messages
  - Mass Email and Campus letters

This is fine when everything is tested and up and running. But, it's too much when we begin live processing for the new aid year. I recommend the jobs are run individually to allow for review of the processing results.

#### FA Processing 5-10-21

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As shown below in 2. d. & e. the Event Definitions and Event 3C Groups have been completed in UAT.

Run Control ID

**Case Sensitive**

Search

Clear

Basic Search 

## Search Results

View 100 First  1-23 of 23  Last

Run Control ID	Language Code
PCCFA_F22115	English
PCCFA_F22115C	English
PCCFA_F22116	English
PCCFA_F22116C	English
PCCFA_F22132	English
PCCFA_F22132C	English
PCCFA_F22133	English
PCCFA_F22133C	English
PCCFA_F22138	English
PCCFA_F22138C	English
PCCFA_F22146	English
PCCFA_F22146C	English
PCCFA_F22400	English
PCCFA_F22400C	English
PCCFA_F22401	English
PCCFA_F22DC1	English
PCCFA_F22DC1C	English
PCCFA_F22DC2	English
PCCFA_F22DC2C	English
PCCFA_F22EN1	English
PCCFA_F22EN1C	English
PCCFA_F22EN2	English
PCCFA_F22EN2C	English

## 2.13 Financial Aid Processing Meetings May Details

3C Engine Parameters Manage Duplicate Assignment

Run Control ID PCCFA\_F22EN2C Report Manager Process IV

### Process 3Cs

Population Selection  
 Trigger Table  
 Mass Change

### Process Joint Records

No Joint Processing  
 Yes, all Joint IDs  
 Yes, if match exists

### Event Selection

Academic Institution  Peralta Community College Dist  
Administrative Function  Financial Aid  
Event ID  2021-22 DHS Elig Non-Citizen [Detail](#)

▼ **Communication Key**

▼ **Checklist Code**  
F22EN2 2021-22 DHS Elig Non-Citizen  
▼ **Checklist Item**  
100 F22EN2 2021-22 DHS Elig Non-Citizen

▼ **Comment Category**

### Population Selection

Selection Tool  [Edit Prompts](#)  
Query Name

### Query Prompts

Comment   
OR Comment 2   
OR Comment 3   
Aid Year   
Checklist

Roderick – Do you have a way to establish the PCCFA\_22 Run Controls in UAT – Similar to how the Event Definitions were created?

Discuss if checklists prevent disbursement – Review User Edit Messages, Disbursement Rules – Global and Item Type:

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Item Type 921200100100 Federal Pell Grant - Alameda      Aid Year 2021  
 Academic Career: Undergraduate      Institution PCCD1

**Tracking/Messages** Find First 1 of 2 Last

Eff Date 01/10/2018      Status: Active      Description Federal Pell Grant - Alameda

**Checklists** Find First 7-8 of 8 Last      **Tracking** Find First 1 of 1 Last

FMAJRM Fin Aid Major Mismatch Summer  
 FMAJRS Fin Aid Major Mismatch Spring

**Service Impact** Find First 1 of 1 Last

**User Edit Messages** Find View 1 First 1-16 of 16 Last

Type Warning      Msg Code CHKLST      Incomplete Checklist Item

Indicators | Tracking/Messages

Academic Institution PCCD1

Academic Career: Undergraduate      Aid Year 2021

**Indicators** Find View All

\*Eff Date 07/01/1964      Status Active

Descr Undergraduate      Short Desc Undergradu

<input checked="" type="checkbox"/> Review Complete	<input checked="" type="checkbox"/> Hold If Withdrawn
<input checked="" type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold
<input type="checkbox"/> Verification Complete	<input type="checkbox"/> Must Meet Satisfactory Prog
<input type="checkbox"/> Post Disb Reduction Control	<input checked="" type="checkbox"/> Hold If No Enrollment Data
<input type="checkbox"/> Post Disb Red Ctrl - Census Dt	<input type="checkbox"/> Match Fees

6. All 80 2021-22 Checklist Items (F22) and related descriptions/comments have been setup in UAT – Migration to PRD has been requested

7. Next:

- a. Add the 80 F22 checklists to the Checklist Function table – Migration to PRD has been requested
- b. Build the Checklist table for the 80 F22 checklists – Migration to PRD has been requested

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- ~~c. Setup the 3C Groups for the 80 F22 checklists – Migration to PRD has been requested~~
  - ~~d. Build 156 Event Definitions required to ‘assign’ and ‘complete’ the F22 checklist codes – Richard~~
  - ~~e. Setup the Event 3C Groups for the Event Definitions – Richard~~
  - f. Setup the 156 3C Engine run controls - Richard
  - g. Setup Jobs to assign and complete the checklist codes – Roderick
8. Identify and update the initial communication templates
    - a. FAFSA Thank You Even
    - b. Financial Aid Award Email Even
  9. Discuss Cal ISIRs, Campus Logic, ISIR home Campus process (in what order is this run?)
  10. Run control strategy – Our jobs are built to run many processes. For example, one JobSet contains:
    - ISIR Home Campus
    - ISIR Inbound
    - Check List Assignment
    - ATB
    - NSLDS
    - Edit Messages
    - Mass Email and Campus letters

This is fine when everything is tested and up and running. But, it's too much when we begin live processing for the new aid year. I recommend the jobs are run individually to allow for review of the processing results.

**FA Processing 5-11-21**

1. Testing for PUM 20 – To be complete Friday
2. FA COA budgets
3. Discuss when the Override ISIR Home Campus process runs and how it works
4. Discuss the requirements for Campus Logic
5. Discuss what has to be done to load CAL ISIRs
6. Discuss if checklists prevent disbursement – Review User Edit Messages, Disbursement Rules – Global and Item Type
7. Complete setup of 3C Engine run controls and setup of Jobs

**FA Processing 5-12-21**

8. Goal – Get the setup done/tested in UAT and migrate to PRD so we can load ISIRs, assign checklists and send welcome email
9. Recommended contact in colleges for questions on budgets and dates



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10. Discuss the requirements for Campus Logic
11. Discuss what has to be done to load CAL ISIRs
12. Discuss if checklists prevent disbursement – Review User Edit Messages, Disbursement Rules – Global and Item Type – Review Abigail’s response

This is the answer Abigail provided:

“Packaging rules and individual item type set up prevent disbursement from happening if incomplete checklists exist.”

Here is Eugene’s response:

“I think 105cl is the main checklist now. We do have other checklist items. But disbursement rules as Abigail has mentioned.”

#### Steps for FA to test in UAT

1. Complete the setup of checklists, 3C Engine and Jobs to assign/complete F22 checklists
2. Question – Are their non-F22 checklists auto assigned?
3. Complete the Aid Year Rollover – This should include new aid year disbursement dates and budget amounts
4. Confirm there are 21/22 ISIRs in UAT ‘Unprocessed’ – There are not any 21/22 ISIRs in the UAT staging tables – We need to import them
5. In UAT only, (because PUM 20 is applied) set the Global Options and ISIR Data Load Params to call INAS – This will test PUM 20
6. For now, do we have to load ISIRs into the staging tables? Looks like the campuses run the 1<sup>st</sup> step to load ISIRs into the staging tables: Nav: Financial Aid > File Management > Import Federal Data Files > FA Inbound
7. Run ISIR Home Campus Mod
8. Run 2<sup>nd</sup> ISIR load step: This is run 4x to load the ISIRs. Nav: Financial Aid > File Management > ISIR Import > Process ISIRs > ISIR File Load. Run controls are FA\_ISIR\_LOAD\_LC, BCC, COA and MC
9. Run 3C Engine processes to initiate/complete F22 checklists – Here we can run a single Job with all the PCCFAF22 checklists
10. Run ATB
11. ~~Process NSLDS Data Push. Nav: Financial Aid > File Management > NSLDS > Update Aggregates with NSLDS > NSLDS Data Push~~
12. Load Cal ISIRs

#### FA Processing 5-14-21

##### Discussion Topics:

1. Review the HEERF Funding Disbursement

Here it what I see at first glance:

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10112539 and others I checked all failed authorization because the Global Disbursement Rules prevent disbursement if the student's Review Status in not Complete and the student's Packaging is not Complete as shown below:

Academic Institution PCCD1

Academic Career: Undergraduate Aid Year 2021

**Indicators** Find | View All First 1 of 1 Last

\*Eff Date 07/01/1964 Status Active

Descr Undergraduate Short Desc Undergradu

- Review Complete
- Package Complete
- Verification Complete
- Post Disb Reduction Control
- Post Disb Red Ctrl - Census Dt
- Hold If Withdrawn
- Honor Disbursement Hold
- Must Meet Satisfactory Prog
- Hold If No Enrollment Data
- Match Fees

Disburse Aid

Mary Zepeda ID 10112539

Aid Year 2021 Federal Aid Year 2020 - 2021 Institution PCCD1

Term 1212 2021 Spring Career Undergrad

**Term Disbursements** Find | View All First 1 of 1 Last

Item Type 921200400500 CARES HEERF II- COA Disbt ID 02 Spring Disb Date 01/20/2021

Accepted \$750.00 Authorized \$0.00

Net Disb Bal \$750.00 Disbursed \$0.00

Authorization Disbursement Messages

**Messages**

Run Date/Time	05/13/2021 9:47:17PM	Disbt ID	02
Student's Packaging is not Complete.			
Disb./Rule Value	Y	Student's Value	1
Run Date/Time	05/13/2021 9:47:17PM	Disbt ID	02
Student's Review Status is not Complete.			
Disb./Rule Value	Y	Student's Value	1

So, this is likely the reason all the students did not get disbursed. Disbursement could be processed with 'Override' but this is not recommended. Let's talk tomorrow about current practices to mark the Student's Review Status as Complete. The status is generally not marked as complete if the student has an open checklist - Which this student has with an initiated SAP Appeal checklist as shown below:

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### Financial Aid Status

Zepeda,Mary

ID 10112539



**Aid Year** Federal Aid Year 2020 - 2021  
**Institution** PCCD1  
**National ID** 573917258  
**Campus ID**  
**Birthdate** 11/18/1986  
**Dependency** Independent w/Primary EFC  
**EFC Status** Official  
**Date Application Received** 12/16/2020  
**CPS Process Date** 12/17/2020  
**Institution Process Date** 12/18/2020  
**Correction Status**  
**Correction Status Date**

**Packaging Status Summary**

**Aid Application Status** Application Active for All Aid  
**Package Status** Applied  
**SAP** Not Meeting Satis Acad Prgrs  
**Review Status** Incomplete  
**INST Verification Status** Non Select  
**Verification Flag** Not Required  
**Verification Status** Not Selected  
**Disbursement Hold**

**Checklists** Personalize | Find | View All | First 1 of 1 Last

Item Code	Description	Status Date	Status
1 F21SAS	2020-21 Spring SAP Appeal	01/06/2021	Initiated

Thanks, Richard

## 2. Home Campus process – Initial results

### Process

**Instance:** 6691347      **Type:** Application Engine  
**Name:** PCC\_ISIRCMPS      **Description:** Override ISIR Home Campus

1-5 of 5 | View All

Severity	Log Time	Message Text	Explain
	7:23:26AM	(0,0)	<a href="#">Explain</a>
	7:23:26AM	Total Number of ISIR Load Files processed: 0 (0,0)	<a href="#">Explain</a>
	7:23:26AM	Total Number of Campus Corrections on ISIRs : 0 (0,0)	<a href="#">Explain</a>
	7:23:40AM	Published message with ID faae6a1c-b4bf-11eb-9861-d3b09cbb0867 to create entry in folder HRMS.	<a href="#">Explain</a>
	7:23:40AM	Successfully posted generated files to the report repository	<a href="#">Explain</a>

## 3. Have Pell Grant schedules for 2021-2022 been loaded?

Schools must import the Department of Education's published Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules directly into your system to evaluate Pell awards.

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Use the Pell Table Load page to import Federal Pell Grant schedules as MS Excel files.

Pell Table Enablement Load

Run Control ID: RUN      Report Manager    Process Monitor    Run

**Parameters**

Aid Year	Federal Aid Year
2019	2018 - 2019

Schedule Type: Regular

Attached File: 1819\_Pell\_Schedules\_18Apr.xlsx

Add Attachment    Delete Attachment    View Attachment

Obtain the Department of Education’s published Pell Payment and Disbursement Schedule for the aid year from the IFAP website (<https://ifap.ed.gov/ifap/>). Only MS Excel (\*.xlsx) versions of the schedule can be loaded; PDF or other formats are not supported.

Note that there is a 64-character limit for the attachment file name, so you may need to rename the file you download from IFAP.

### FA Processing 5-17-21

#### Discussion Topics:

1. ISIR load process fails to read any records – Msg says: Multiple School Code Exists. Roderick has filed a ticket with Oracle. This is important as it’s in our critical path to go live for the new aid year
2. Success with Aid Year Rollover
3. Success with loading ISIRs manually
4. Success with building FA Terms manually
5. Success with building budgets manually
6. Problem with Student Records Term/Session table setup – Dates need review

### 2.13 Financial Aid Processing Meetings May Details

[Term Table](#) | [Session Table](#) | [Session Time Periods](#) | [Integration Dating](#)

**Academic Institution** PCCD1 Peralta Community College Dist  
**Academic Career** UGRD Undergraduate C  
**Term** 1222 2022 Spring

\*Description 2022 Spring  
 Short Description S22  
 \*Term Category Regular Term  
 \*Term Begin Date 01/01/2022 \*Ending Date 12/31/2022  
 \*Academic Year 2022  
 \*Holiday Schedule STDNT Student Holiday Schedule  
 Default Session Code  
 \*Weeks of Instruction 17  
 \*Transcript Date Print Do Not Print Any Dates  
 \*Sixty Percent Point in Time 01/01/2022  
 Use Dynamic Class Dates   
 \*Max Program Effdt for Term 01/01/2022

#### Valid Terms for Careers

**Academic Institution** PCCD1  
**Aid Year** 2022 Federal Aid Year 2021 - 2022  
**Academic Career** UGRD Undergraduate

Valid Terms for Career		Find	First	1-3 of 3	Last
*Term	1223	Descr	2022 Summer	Short Desc	M22
Award Period	Academic				
Loan Period Start	06/01/2022	Validated Payment Period Start	06/01/2022		
Loan Period End	08/01/2022	Anticipated Aid Display Date			
*Term	1222	Descr	2022 Spring	Short Desc	S22
Award Period	Academic				
Loan Period Start	01/01/2022	Validated Payment Period Start	01/01/2022		
Loan Period End	12/31/2022	Anticipated Aid Display Date			
*Term	1214	Descr	2021 Fall	Short Desc	F21
Award Period	Academic				
Loan Period Start	08/23/2021	Validated Payment Period Start	08/23/2021		
Loan Period End	12/17/2021	Anticipated Aid Display Date			

## 2.13 Financial Aid Processing Meetings May Details

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Richard Davis  
 Thu 5/13/2021 8:09 PM  
 To: Amany ElMasry; Silvia Cortez  
 Cc: Amanda Lim; Hemanth Kumar; Marla Williams-Powell  
 Bcc: Richard Davis



Hi Amany and Silvia,

This question is in regard to the Term Begin Date and the Ending Date on the Term/Session Table for terms 2014, 1222 and 1223 which represent the new Financial Aid year 2022.

It's my understanding the start date should correspond to the first day of instruction for the term and the end date should correspond to the last day of instruction for the term. The dates are also used in Financial Aid processing to calculate the loan period start and end dates.

That said, I'm asking if you would review the existing setup in PRD with particular attention to the Spring 2022 term 1222 that has a start date of 01/01/2022 and end date of 12/31/2022 - Thank you, Richard

7. Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD
8. Request to Teresa for access in PRD – Create Group Data Entries
9. Upcoming request to Roderick to load the Pell Grant schedules for 2021-2022
10. Upcoming – Testing Comm Gen for Welcome email, need to test the Cal Grant mod, give approval to apply PUM20 in PRD

### **FA Processing 5-18-21**

#### Fa Process Testing in UAT

1. Success with Aid Year Rollover
2. ISIRs were imported into staging tables for all 4 colleges and the Home Campus Mod was run
3. ISIRs have been loaded for all 4 colleges - 280 loaded and 133 suspended
4. 211 F22 checklists assigned using Job PCCFA3Cs
5. Success with building FA Terms manually and in batch
6. Success with building budgets manually and in batch
7. Need to have college FA Staff confirm budgets – Schedule Teams Mtg
8. Student Records Term/Session table setup – Dates updated by Armany for the 3 terms in aid year 22 in PRD and UAT - Done
9. Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD
10. Request to Teresa for access in PRD – Create Group Data Entries – Has been approved by Adil
11. Request to Roderick to load the Pell Grant schedules for 2021-2022

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12. Upcoming – Testing Com Gen for Welcome email, need to test the Cal Grant mod, give approval to apply PUM20 in PRD
13. Test additional ISIR loads and checklist assignments – Make sure Responsible ID is correct in Personal Checklist record for F22115, 132, 146
14. Today:
  - a. Test process to assign letter codes
  - b. Test Com Gen process to produce email
  - c. Review setup for ATB, NSLDS and Edit Message
  - d. Set up meeting with Jonathan Olkowski

**FA Processing 5-19-21**

Discussion Topics:

## Fa Process Testing in UAT

1. FA gives its approval to apply PUM20 to PRD. No errors have been experienced during testing in UAT. The INAS calculation process is working as expected
2. Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD. Please migrate to DEV now for testing the migration
3. Request to Teresa for access in UAT, DEV and PRD (RICHARD.DAVIS AND FABATCH) – Create Group Data Entries – Has been approved by Adil
4. Roderick loaded the Pell Grant schedules for 2021-2022 in UAT. Richard to test and request move to PRD
5. Roderick loaded additional ISIRs to suspense for testing. The Home Campus Mod and ISIR Load and checklist assignment were tested with no errors. These processes are now ready for production
6. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
7. Review request for Hemanth to spearhead certain tasks
8. Today:
  - a. Test process to assign letter codes
  - b. Test Com Gen process to produce email
  - c. Review setup for ATB, NSLDS and Edit Message
  - d. Begin testing of the Cal ISIR process
  - e. Begin testing of interface with Campus Logic

a.

**FA Processing 5-19-21**

Discussion Topics:

## Fa Process Testing in UAT

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1. Tested process to assign letter codes
2. Tested Com Gen process to produce email
3. Migration of Budgets and Disbursement Dates to DEV for testing
4. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
5. Update from Hemanth on certain tasks
6. Possible update to the Thank You letter template
7. Status of 'links' in checklists and emails
8. Upcoming meeting with Campus Logic
9. Continuing:
  - a. Review setup for ATB, NSLDS and Edit Message
  - b. Begin testing of the Cal ISIR process
  - c. Begin testing of interface with Campus Logic

**FA Processing 5-21-21**

## Discussion Topics:

1. Status of 'links' in checklists – Thanks to Roderick, the 'links' in 50 F22 checklists are now activated i.e. will take the student to the linked URL. This is a gain in function from prior years processing – Demo student 10053928 Chklist F22SSI
2. Status of 'links' in Thank You email – Demo to show areas needing update
3. 2021 – 2022 Forms needed to be added
4. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
5. Where can we see what moves the ISIRs to Campus Logic I understand data is moved via a move it script that moves data to OCI and Campus Logic. Do you where this is in the scheduler or someplace else. Also, we need visibility to whatever Chiran has created to complete the student's review status when all checklists are completed along with what is the 105CL that is created
6. Review meeting with Campus Logic
7. Continuing:
  - a. Review setup for ATB, NSLDS and Edit Message
  - b. Begin testing of the Cal ISIR process
  - c. Begin testing of interface with Campus Logic

**FA Processing 5-24-21**

## Discussion Topics:

11. Pum20 is applied to PRD
12. Migrate 2022 setup data to PRD including FTE (Thank you email) template
13. Load 2021-2022 Pell Grant Schedules in PRD
14. FA is almost ready to process 2021/2022 ISIRS
15. Game plan to update FA Links – See below
16. Amanda to load Fiscal Item Types for SEOG, FWS and others



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17. We need visibility to whatever Chiran has created to complete the student's review status when all checklists are completed along with what is the 105CL that is created
18. RD to have temporary password to FABATCH in PRD to access run controls
19. Continuing:
  - a. Begin testing Cal ISIR process

**FA Links:**

Hi Amanda and Marla - Regarding the links that can be accessed from the 'Thank You' email: These can be viewed using the test email that was sent.

A review of the links reveals several areas that could be/should be updated. There's a lot here - Let's discuss on Monday the best way forward.

Here's a summary:

- Click on <http://web.peralta.edu/financial-aid/documents/> - 2021-2022 forms s/b added. 2019-2020 could be deleted
- Look at the Navigation links on the left
  - Financial Aid Home - Is the Contact information for each college accurate?
  - How to Request IRS Verification of Non-filing Letter - Refers to calendar year 2016
  - Documents and Forms - Add 21/22 and delete 19/20
  - How to Apply for Financial Aid - Gives an example for 2015-2016
  - Financial Aid Disbursement - Needs to be updated for Fall 2021 and Spring 2022
  - California Promise Grant - Should be updated for Aid Year 2021-2022
  - Student Loans - Should be updated for Aid Year 2021-2022
  - Consumer Information - Annual Estimated Cost of Attendance - Should include Cost of Attendance for 2021-2022
  - Financial Aid Meeting Minutes - Latest minutes are 2016
  - PCCD Financial Aid Handbook - Needs to be updated/replaced to 2021-2022

**ISIR Processing Steps – Rev1**

1. Make sure the scheduled FA Jobs are not activated for the 2021-2022 processing. The initial ISIR processing will be manual (from the menu) to confirm the run controls and the results of the processes. Jobs for ATB, NSLDS, Edit Message, FA Term, Budgets are not ready for PRD runs yet
2. Make sure the aid year setup is complete in PRD

## 2.13 Financial Aid Processing Meetings May Details

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3. Double check the budget items, disbursement dates, AY Rollover, Pell Schedules, etc.
4. Make sure the links on the 'Thank You' email work, and the aid year forms, disbursement dates, etc. are updated – Test the Thank You email for all 4 colleges to make sure the right logo, etc. appear
5. RF to load the 2021-2022 ISIR files in PRD
6. RD to run the Override ISIR Home Campus PCC\_ISIRCMPS run control PCCFA\_ISIR\_Campus\_Update - Must be run the same date the ISIRs are loaded into staging
7. RD to run FAPSAR00 for the 4 campuses to load ISIR data
8. RD to run Job PCCFACS to assign F22 checklists only
9. RD to run processes to assign the FTE letter code only
10. RD to run Comm Gen processes to send 'Thank You' email - Run control PCCFA\_FTE (updated for 2021-2022 aid year)
11. Confirm the 3:00PM Move-It process produced/transferred the 21/22 ISIR data to Campus Logic for each campus – Log on to Campus Logic to view status – Hermanth working with Jackie. Also, add our User Accounts to allow access as an external user
12. Begin sending ISIR Correction to CPS and loading correction response files
13. Begin processing Cal ISIRs

**FA Processing 5-25-21**

## Discussion Topics:

1. Status of individual campus 21/22 ISIR download from CPS:
  - a. Angie replied: The ISIR uploads for 2021-2022 are up to date. The path where they are located is, ISIR > \\psfilesprd2.ad.peralta.edu>COA>Archive>2021-2022 ISIRs.
2. Loading of Cal ISIRS:
  - a. Angie replied: The Cal ISIR process is a manual load. The path psfilesprd2>CALISIR>COA>Import>21-22 CAL\_ISIRs
  - b. Loan replied: Per my understanding, there is no need for the colleges to do anything on our end for the CAL ISIR load  
Currently, for my college we manually load CA ISIRs, it would be best for this process electronic as well. If so, then please let us know where to place those CA ISIRs files.  
As long as the CA application in the system is ready then it should be good
3. Update on PCCD Financial Aid Website
4. Successfully tested the load of 2021-2022 Pell Grant Schedules in UAT. Requested load to PRD
5. Aid Year 2022 Pell setup tables completed in PRD. Max Pell increased \$150 from 6345 to 6495 and max EFC increased \$135 from 5711 to 5846

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6. The requested migration of 2022 data to PRD is complete – Currently reviewing in PRD
7. Has Chiran responded with information about his creating a process to complete the student's review status when all checklists are completed along with any knowledge about the 105CL that is created?
8. Comm Gen – 10 test emails sent from UAT on Sunday were not received until Monday
9. Testing Cal ISIR process

**FA Processing 5-26-21**

Discussion Topics:

1. Status of FA Website update
2. Detailed go live steps for loading Federal ISIRS
3. Helping college disburse CARES HEERF II

**FA Processing 5-28-21**

Discussion Topics:

1. Status of loading 21/22 Federal ISIRs
  - a. The ISIR Inbound was run successfully for all colleges to load ISIRs from the staging to the data tables
  - b. Confirm why there are ISIRs remaining in suspense as unprocessed
2. Status of FA Website update:
  - a. Cost of attendance being updated
  - b. Financial Aid Home - Contact information being updated
  - c. Documents and Forms - Add 21/22 and delete 19/20
  - d. Recommendation to change verification comments:
  - e. NOTE – Confirm that the links to Campus Logic work!

FROM:

Complete and return the [2021-2022 V1 Verification Worksheet](#) via email, fax, mail, or online through CampusLogic by clicking on your college's Verify My FAFSA link below:

<https://alamedaperalta.verifymyfafsa.com>

<https://merritt.verifymyfafsa.com/>

<https://laney.verifymyfafsa.com/>

<https://berkeleycitycollege.verifymyfafsa.com/>

To:

You can complete the verification online through CampusLogic by clicking on your college's Verify My FAFSA link below:

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[list the links]

If you have questions or problems using CampusLogic, please contact your college's financial aid office for assistance.

3. Planning for Fall batch packaging
  - a. Target 6/15 but last year was July
4. Planning for Summer awarding:
  - a. Summer starts in 2 weeks
  - b. Joe said spring grades post xx?
  - c. SAP should be 6/4
  - d. Target week of June 6<sup>th</sup> for packaging of Pell
  - e. Revisit summer year-round Pell
5. Helping colleges disburse CARES HEERF II – ongoing
6. Resolution of disbursed aid not crediting student's account – ongoing
7. Charin to explain the Campus Logic 105CL and process to 'Complete' student's 'Review' status if no checklists remain initiated