Financial Aid Processing 6-1-21

Priority Items:

- Amanda to confirm budgets with Angie
- Hemanth to confirm 21/22 ISIR data is being picked up by Campus Logic – Demonstrate what it looks like to a student. Work with Jackie to get a student's credentials (or our own) so we can log on to view
- Hemanth – Provide update on testing the Cal ISIR, Cal Grant (with rosters) and CCPG Waiver (Community College Promise Grant (aka BOG Waiver)
- Roderick – Confirm the checklist 'Links' are active and the 'Links' for F22V1, F22V4 and F22V5 link to Campus Logic verification

Processing Status:

- 21/22 ISIRs have been loaded
- Colleges are inbounding ISIRs daily
- Jobs are scheduled daily to run the Home Campus Mod and the ISIR Load
- ISIR data is being transferred to Campus Logic

Next Steps Leading to Fall 21 Packaging:

- Amanda to finalize budget amounts with Angie. Ask Angie if the $85 AC Transit cost should be included on the budget sheet totals? Can Books and Supplies, AC Transit, Personal and some summer amounts be increased $1 to even amount? This allows the Institutional amount to equal the Pell amount
- Confirm the 21/22 ISIR data is in Campus Logic – How to test this?
- Confirm Cal ISIRs load process
- Status of Cal Grant mod? Handling of rosters?
- Final preparation to assign checklists and send 'Thank You' email:
    - Confirm the checklist 'Links' are active
    - Confirm the checklists 'Links' for F22V1, F22V4 and F22V5 link to Campus Logic
    - Test the Comm Gen process in PRD with 21/22 'Thank You' template. RD to test signed in as RD
    - Review with Teresa multiple receipts of Comm Gen emails and any requirement to limit the number of emails sent in one process
    - Test query in PRD to assign checklists and letter codes
- Confirm 21/22 ISIR Corrections Export and FA Outbound processes. Add to daily Job
- When ready, notify colleges ISIR corrections can now begin
- Test processes to build FA Terms and Budgets
- When ready, schedule daily processes to build FA Terms and Budgets
- Begin testing Award Letter
- Confirm new Pell Tables are loaded in PRD

- Update Fiscal Item Types allocations for SEOG, FWS and other state allocations
- Confirm with FIN and SF fund allocations/budgets
- Understand use of Equation Variables and other mods used for packaging
- Begin testing Fall 21 batch packaging and repackaging – In simulation
- Confirm new COD schema

Next Steps Leading to Summer 21 Packaging:

- Review criteria to calculate SAP with Spring grades posted
- Update the Summer term start/end dates, disbursement dates
- Test summer packaging plans

Financial Aid Processing 6-2-21

Priority Items:

- It appears the 21/22 ISIR data has not been picked up by Campus Logic. This must be resolved prior to assigning checklists and sending the welcome email. Roderick is setting up a meeting with Campus Logic to resolve the issue
- Amanda has confirmed the budget amounts with Angie. RD has setup budget items in PRD and currently testing budget formulas in PRD
- RD to determine why, in PRD, just the Fall 21 term is building in projections and not Spring 2022 - Possibly expected grad date issue
- Hermanth is facilitating a meeting today with Chiran regarding Campus Logic checklist 105CLand process to complete student's 'Review' if no checklists – Where/when is it run? Meeting to also include Cal ISIR mod
- Hemanth – Provide update on Cal Grant (with rosters) and CCPG Waiver (Community College Promise Grant (aka BOG Waiver)
- Roderick – Confirmed the checklist 'Links' are active and the 'Links' for F22V1, F22V4 and F22V5 do link to Campus Logic verification

Processing Status:

- 21/22 ISIRs have been loaded
- Colleges are inbounding ISIRs daily
- Jobs are scheduled daily to run the Home Campus Mod and the ISIR Load
- ISIR data is being transferred to Campus Logic

Next Steps Leading to Fall 21 Packaging:

- Confirm the 21/22 ISIR data is in Campus Logic – How to test this?
- Confirm Cal ISIRs load process
- Status of Cal Grant mod? Handling of rosters?
- Final preparation to assign checklists and send 'Thank You' email:
    - Test the Comm Gen process in PRD with 21/22 'Thank You' template. RD to test signed in as RD

- o Review with Teresa multiple receipts of Comm Gen emails and any requirement to limit the number of emails sent in one process
  - o Test query in PRD to assign checklists and letter codes
- Confirm 21/22 ISIR Corrections Export and FA Outbound processes. Add to daily Job
- When ready, notify colleges ISIR corrections can now begin
- Test processes for ATB, Process NSLDS Request, User Edit Msg, Transfer Alert File, etc.
- Test processes to build FA Terms and Budgets
- When ready, schedule daily processes to build FA Terms and Budgets
- Begin testing Award Letter
- Confirm new Pell Tables are loaded in PRD
- Update Fiscal Item Types allocations for SEOG, FWS and other state allocations
- Confirm with FIN and SF fund allocations/budgets
- Understand use of Equation Variables and other mods used for packaging
- Understand need to update FA Units in Progress
- Begin testing Fall 21 batch packaging and repackaging – In simulation
- Confirm new COD schema

Next Steps Leading to Summer 21 Packaging:

- Review criteria to calculate SAP with Spring grades posted
- Update the Summer term start/end dates, disbursement dates
- Test summer packaging plans
- Update FA Units in Progress, FA Award /Exit Counseling /Loan Disbursement letters for summer
- NSLDS Process Request for Summer
- COD User Edit Messages for Summer
- UEM CHKLST for Summer

FA Processing 6-7-21

Top Items:

- Process SAP
- Assign checklists
- Summer Packaging
- External Awards process to award CARES HEERF II

1. Move to process SAP today. Confirm – Have grades been posted? I recommend running the 13 individual processes from the Navigator as opposed to the JobSet. This gives one more opportunity to check the parameters and

monitor the results of each step. It will also allow for the test of the two email communications. Is it ok for me to run the processes as FABATCH manually?

2. Amanda to notify FAOs that SAP is being run today – Once RD says it good to go

3. Summer 2021 Packaging – We can move forward on this after today's SAP run. RD to contact Angie regarding summer Pell – Is it a header or trailer. Should we use the 20/21 or 21/22 Pell amounts. Are there any implications regarding year-round Pell? RD to confirm the JobSet with Roderick. RD to confirm beg/end date for summer term 1213 – Update the summer term dtes on the Valid Terms for Career page. Also, update the summer term census date on the Setup FA Term page. Also, update the summer disbursement ID table for 7L,8L, CG, EA, P2

4. RD to determine requirements to update FA Units in progress process to run for summer

5. RD to verify summer disbursement dates

6. Move to assign checklists – Pending a final check, we can move to run JobSet PCCFAB139 to call only the 3C Engine process to assign the checklists and then run the 'Thank You' email. RD plans to test the ATB, NSLDS Request and Edit Message processes this week. Then they can be added to the JobSet and run daily

7. RD to test the 21/22 ISIR correction setup/processes

8. FA Term Build for 21/22 – RD not yet able to build Spring 2022 term in projection. However, it works in UAT

9. Hemanth to work with Richard to use External Awards to award and disburse the 4000 HEERF II Grant students at Merritt plus those at Laney and BCC

10. Hemanth to update:
    a. FA Award letter for summer
    b. Exit Counseling letter for summer
    c. Loan Disbursement letter for summer

FA Processing 6-8-21

Discussion Topics:

1. Summer SAP:
   a. The Summer SAP has been processed
   b. Resulted in 862 SAP Disqualification Notifications (FP4) and 106 SAP Warning Notifications (FEW)
   c. Roderick should now schedule PCCFAB140, Job Name PCCFA058 to run daily

2. Next Up:

       a. Summer Packaging
       b. Assign Checklists
       c. External Award process to batch award CARES HEERF II
       d. Loan's request to auto award SEOG – Action request: Hemanth – Please create the selection query of all BCC Pell recipients who are full-time, zero EFC, and have not received SEOG for spring 2021
       e. Loan's Request: We have the remaining SEOG budget of $2,840 plus a $25,000 transfer from FWS so a total of **$27,740.00** for the school year 2020-21.
           Can you please auto package/pay $300 to all Pell recipients who are full-time, zero EFC, and have not received SEOG for spring 2021?
           We need to spend SEOG budget by June 30, 2021.

FA Processing 6-9-21

Discussion Topics

Priorities:

1. Roderick – The Event 3C Groups in PRD need to be populated with FUSR

2. Richard – Re-run the checklist assignment job

3. Richard – Assign Letter Code for FP4 (Thank You) then run CommGen to send 8000+ emails. Richard will then ask Roderick to schedule the processes daily

4. Once complete (Richard will confirm with Amanda), Amanda to notify colleges with an email something like this:

   Please know that the 21/22 ISIR C Code checklists (beginning with F22) have been assigned to students based on their 21/22 ISIR C Codes and the 'Thank You' emails have been sent to the 8000+ students with a loaded 21/22 ISIR. These steps have now been scheduled to run daily.

5. Hemanth to advance the awarding of the summer CCPG waiver – This is in the critical path for summer awarding

   Just a note….please ensure to apply CCPG wavier to the student's account first prior to run summer disbursement as if we don't then the student's FA payments will apply to the student's account.
   This means that students won't be able to receive their summer FA payment in the full amount.

6. Richard to advance summer packaging – Timing is important as the Pell award is scheduled to be disbursed between June 10 and June 17

7. Hemanth to advance the batch (External Awarding) of the 4000 Merritt (and likely other colleges) students the HEERF II Award

8. Hemanth to advance the batch (External Awarding) of the remaining SEOG budget at BCC (and possibly other colleges) - See Instructions for Loading SEOG awards in batch using File Parser on the W Drive/Departments/FA/District/Abigail and Eugene

   Email from Loan: We have the remaining SEOG budget of $2,840 plus a $25,000 transfer from FWS so a total of **$27,740.00** for the school year 2020-21.
   Can you please auto package/pay $300 to all Pell recipients who are full-time, zero EFC, and have not received SEOG for spring 2021? We need to spend SEOG budget by June 30, 2021.

FA Processing 6-10-21

Topics for discussion:

Top Priority is Summer Packaging – Need to award and disburse Pell prior to Thursday June 17th

1. There is a need to determine why 3970 students with 2022 ISIRs were not assigned the FTE 'Thank You' email while 4340 letter code/email were processed with Instance 6779894 that didn't get one and 10919210 who did
2. Worked with Teresa/Charin to figure out why the 3CEngine process is not assigning the FTE Letter Code for 3970 students - No resolution yet We tried with a new run control. An urgent meeting is required with Richard, Roderick and Charin to figure this out! Because we have 3970 students that have sent in an ISIR we have not acknowledged
3. There appears to be something wrong with the system processing – Why, for example, weren't all the checklists assigned during the first process and why weren't all the letter codes assigned ?? ID 11087486 is an example of student that did not get letter code assigned
4. The immediate goal is to complete summer packaging
5. There are 3408 students with summer 2021 FA Term. But **summer budgets are not built** – Why aren't summer budgets being built?
6. Hemanth and I have pieced together the 'as is' process to administer the CCPG/BOG Waiver. The manual process must continue for now until we have time to work on it
7. Roderick can go ahead and schedule the Job PCCFA3CS for the 3Cs steps only and add to it the Ability to Benefit PCCFA017 and just the 3C Engine run control PCCFA_FTE followed by the CommGen process run control PCCFA_FTE

FA Processing 6-14-21

Topics for discussion:

Top Priority is Summer Packaging – Need to award and disburse Pell prior to Thursday June 17th

1. Resolved – Charin proposed fix that worked. By removing the duplicate communications check box, FTE (Thank you) letter codes were assigned and subsequently sent to students with the CommGen process
2. Roderick is now running a scheduled job daily to assign checklists, process ATB (Ability to Benefit), Assign nd send the Thank You email. Once tested, the NSLDS request and User Edit Messages will be added to this daily process
3. The immediate goal is to complete summer packaging
4. It was determined that summer term budgets were not being built. This has been resolved. It turned out the equation processor for the batch run, used to set the aid year in the budget build run control, needed to be updated for 2021
5. College FAOs continue to manually administer the CCPG/BOG Waiver by assigning the appropriate SF Equation Variable that is accessed by the Tuition Calculation process to apply the waiver
6. Update on Summer Pell packaging

FA Processing 6-16-21

Topics for discussion:

Top Priority is Summer Packaging – Need to determine the cause of the error in the final step of Process Mass Packaging – Instance 6863187

1. Roderick – Please look at why query PCCFA_PACK_NON_VERF_POP with prompts for AY 2021 and Term 1212 does not run to completion. This should be resolved before the ongoing Mass Packaging for 2021 is changed back to the Live mode and run daily

2. The Mass Packaging for Summer will be processed as a separate Job. However, the initial live mode will be done manually by Richard after testing in simulation

3. Roderick - An error occurred in Process Instance 6863187 FAPPKBKG when testing summer packaging. This needs to be resolved before testing can continue:

```
FAPPKCTL --> Version: 2018.92.PI10.01
> 2021-06-15-22.55.35.820000 INFO(14460,341) PI(6863187) Program(FAPEQRUN)
Could not log message

Application Program Failed
 In Pgm Section  : SQL-LOGMSG
 With Return Code: 00805
 Error Message   : ORA-00001: unique constraint (SYSADM.PS_MESSAGE_LOG) violated
```

4. An email was sent to each FAO requesting a review and confirmation of the results. Richard reviewed the simulation results with each college. Agreement was reached that

the Pell amounts were correct with one exception: Seven students with a Pell amount of $793 seem to have a previously recognized problem with the <1/2 Time Pell COA. It was decided to remove them from the packaging until resolution is reached. This is supported by Loan who mentioned it was an issue in prior terms that required manual intervention

5. Note – All FAOs express concern that the number of students selected for summer mass packaging seems low compared to students enrolled for summer. This needs a detailed revied of the selection criteria dictating eligibility requirements

6. Hemanth to update the SEOG, CARES HEERF awarding, etc.

FA Processing 6-17-21

Topics for discussion:

Top Priority is Summer Packaging – Need to determine the cause of the error in the final step of Process Mass Packaging – Instance 6863187

1. The Mass Packaging for summer was partially successful today 6-17 after encountering several processing errors. On Monday, the Mass Packaging for summer was successful in 'Simulation' mode

2. Roderick – Please look at why query PCCFA_PACK_NON_VERF_POP with prompts for AY 2021 and Term 1212 does not run to completion. This should be resolved before the ongoing Mass Packaging for 2021 is changed back to the Live mode and run daily

3. Hemanth to update the SEOG, CARES HEERF awarding, etc.

FA Processing 6-23-21

1. Summer Packaging – This is now working as expected. When the assign process fails it's for one of two reasons. One fix is to run the process again. The other is to remove/save the selected ID causing the error as shown on the trace file. The next step is to have Roderick schedule the summer packaging job to run daily and we will watch for any errors
2. Mismatch errors are preventing 13 students from packaging – Expected response from Brenda (Oracle) for option to update FA Term Campus
3. Richard to test and, when successful, ask Roderick to add back the PCCFA038 (Process NSLDS Request/Edit Messages/Load Transfer Alert File) and PCCFA041 with certain letters – These to be added to the PCCFA076 Job
4. Hemanth to update the SEOG, CARES HEERF awarding, etc.
5. See Angie's email requesting: What information do you need from me to award the remaining FSEOG to students who have not received it for the College of Alameda? SWOG must be awarded by the end of June

FA Processing 6-28-21

1. Batch summer Pell repacking has been processed. Colleges must manually repackage their LTHT students as follows:

   These queries only select LTHT students what would have been packaged summer Pell with $799. Additional queries will be provided (next week after the next run of summer Pell repackaging) for all LTHT amounts for review and correction if necessary
   FA_SFA_BRPKG_AWDVW_3094_BCC - Selects 48 students
   FA_SFA_BRPKG_AWDVW_3094_COA - Selects 32 students
   FA_SFA_BRPKG_AWDVW_3094_L - Selects 80 students
   FA_SFA_BRPKG_AWDVW_3094_M - Selects 72 students

2. The HEERF ll award was batch Auth/Disb that created Group Date Entry1735 with a Control total of 922 (primarily Laney and Merritt students) totaling $1,020,000. This will credit the student's account when the Group Post is next run. The following amounts awarded have not been disbursed: Most likely because student has withdrawn. Awards s/b cancelled so funds become available to award. Colleges can run these queries to identify students awarded but not awarded because they did no meet requirements for disbursement:
   a. Merritt = 5000   FA_HEERF_NOT_DISBURSED_MERRITT
   b. Laney = 30750 FA_HEERF_NOT_DISBURSED_LANEY
   c. COA = 12000   FA_HEERF_NOT_DISBURSED_COA
   d. BCC = 0   FA_HEERF_NOT_DISBURSED_BCC
3. Discuss action plan for this:

   Greetings Marla,
   I just spoke to Ms. Pharr and she informed me that based on the General Ledger the available HEERF II funds for Merritt College is $53,832.67.
   We would like the remaining amount to be awarded to our students. Based on my calculations 107 students would receive $500 for this remaining round.
   If you have any questions please do not hesitate to call me (650) 219-5874.
   Dr. Lilia Chavez
   Vice President Student Services

4. Richard to work with Roderick to determine why the Pell Only repackaging plan is running daily in 'Simulation' mode
5. Richard to work with Roderick to set up summer repackaging as a regularly scheduled Job. However, LTHT students will continue to be awarded Pell manually
6. Richard to test and, when successful, ask Roderick to add back the PCCFA038 (Process NSLDS Request/Edit Messages/Load Transfer Alert File) and PCCFA041 with certain letters – These to be added to the PCCFA076 Job
7. Richard to set up 21/22 fall/spring packaging ASAP

8. Richard to follow up on Loan's email about fall/spring budgets not being built:
   Hi Richard,
   It seems like 2021-2022 budget was not loaded. Please see an example below:
   ID#30004192
9. Hemanth to update the SEOG, CARES HEERF awarding, Cal ISIR, etc.
10. See Angie's email requesting: What information do you need from me to award the remaining FSEOG to students who have not received it for the College of Alameda? SWOG must be awarded by the end of June
11. Amanda – Update for new Item Type for BCC

FA Processing 6-29-21

1. Status of CARES MSI Grant – Merritt and CARES DHSI – Berkeley???
2. Amanda – Please check with FAOs to see if they are manually repackaging their LTHT summer Pell students
   a. Batch summer Pell repacking has been processed. Colleges must manually repackage their LTHT students as follows:

   These queries only select LTHT students what would have been packaged summer Pell with $799. Additional queries will be provided (next week after the next run of summer Pell repackaging) for all LTHT amounts for review and correction if necessary
   FA_SFA_BRPKG_AWDVW_3094_BCC - Selects 48 students
   FA_SFA_BRPKG_AWDVW_3094_COA - Selects 32 students
   FA_SFA_BRPKG_AWDVW_3094_L - Selects 80 students
   FA_SFA_BRPKG_AWDVW_3094_M - Selects 72 students

3. The HEERF ll award was batch Auth/Disb that created Group Date Entry1735 with a Control total of 922 (primarily Laney and Merritt students) totaling $1,020,000. This will credit the student's account when the Group Post is next run. The following amounts awarded have not been disbursed: Most likely because student has withdrawn. Awards s/b cancelled so funds become available to award. Colleges can run these queries to identify students awarded but not paid because they did not meet requirements for disbursement:
   a. Merritt = 5000   FA_HEERF_NOT_DISBURSED_MERRITT
   b. Laney = 30750 FA_HEERF_NOT_DISBURSED_LANEY
   c. COA = 12000   FA_HEERF_NOT_DISBURSED_COA
   d. BCC = 0   FA_HEERF_NOT_DISBURSED_BCC
4. Richard to work with Roderick to determine why the Pell Only repackaging plan is running daily in 'Simulation' mode
5. Richard to work with Roderick to set up summer repackaging as a regularly scheduled Job. However, LTHT students will continue to be awarded Pell manually

6. Richard to test and, when successful, ask Roderick to add back the PCCFA038 (Process NSLDS Request/Edit Messages/Load Transfer Alert File) and PCCFA041 with certain letters – These to be added to the PCCFA076 Job
7. Richard's top priority is to set up 21/22 fall/spring packaging ASAP
8. Richard to work with Roderick to update the ISIR Corrections Outbound to update EVEN run controls from 2020 to 2022
9. Richard to work with Roderick on Schedule PCCFAB130 – FA Term and Budgets Fall 21 – It seems it is set for aid year 20/21 and not 2022. This may be the reason Loan mentioned the 21/22 aid year budgets are not being built
10. Richard to work with Roderick to follow up on Loan's email about fall/spring budgets not being built:
    Hi Richard,
    It seems like 2021-2022 budget was not loaded. Please see an example below: ID#30004192
11. Hemanth to update the SEOG, CARES HEERF awarding, Cal ISIR, etc.
12. See Angie's email requesting: What information do you need from me to award the remaining FSEOG to students who have not received it for the College of Alameda? SWOG must be awarded by the end of June
13. Amanda – Update for new Item Type for BCC

FA Processing 6-29-21

1. Roderick has completed the new aid year FA Term and Budgets build Jobs. These will be tested and put into production
2. Richard resolved the reason the spring FA term for aid year 21/22 was not building in PRD. The F Census Date was dated 2/7/21 instead of 2/7/22
3. The ISIR Corrections Outbound Job has been updated for the EVEN run controls from 2020 to 2022 and is now in production
4. Richard to work with Roderick to determine why the Pell Only repackaging plan is running daily in 'Simulation' mode
5. Richard to work with Roderick to set up summer repackaging as a regularly scheduled Job. However, LTHT students will continue to be awarded Pell manually
6. Richard to test and, when successful, ask Roderick to add back the PCCFA038 (Process NSLDS Request/Edit Messages/Load Transfer Alert File) and PCCFA041 with certain letters – These to be added to the PCCFA076 Job
7. Richard's top priority is to set up 21/22 fall/spring packaging ASAP
8. Richard to work with Roderick to update
9. Hemanth to update the SEOG, CARES HEERF awarding, Cal ISIR, etc.
10. Amanda – Update for new Item Type for BCC