FA Processing 7-1-21

1. Yesterday Laney CARES Act students who previously failed authorization were batch Auth/Disb by removing 2 Global Rules. Awarded 450+ students $77000.
2. Hermanth awarded additional SEOG funds for COA
3. Yesterday all processing on HEERF II funds was put on hold
4. Richard has determined how to change F Term 'Home Campus' and can move to resolve the 18 or so students not selected in the Mass Packaging Assign process due to Campus Mismatch
5. Amanda made progress on two new Item Type setup requests
6. Plan today is to test Job 078 FA Term & Budgets for fall 21
7. Top priority is 21/22 fall/spring Mass Packaging. Current thinking is to have setup completed in PRD on Tuesday 7/6 in time for the refresh of UAT with PRD on Tuesday night. Then, test Mass Packaging in UAT on Wednesday 7/7. Each college will then be asked to confirm the results prior to the live packaging in PRD. The planned steps are good, but the timing may slip
8. Status Update – Roderick - What is the status of the Campus Logic checklist 105CL. Looks like it is being assigned. What is the status of the project Charin is working on to complete checklists and update student's review status to complete?
9. Summer Loan – Loan asked: Can you please let us know if we can award for the summer loan now? Marla wrote: Let's discuss, the VP at BCC is asking for an update

FA Processing 7-6-21

1. Update on FA Term and Budgets:
    a. FA Term/Budgets are now built correctly for the new year fall/spring
    b. Campus FAOs have been alerted and asked to review the budgets
    c. Not yet explained – Approx. 140 students showing enrolled FT in fall term 1214 but have 'No Unit Load' – Therefore, no budget build – But there is a budget for spring term 1222 based on projected enrollment
2. Campus Logic – Meeting scheduled this evening 4:30-5:00 Pacific RE: Campus Login Process Navigation (Charin, Richard, Hemanth) Roderick? This meeting is important as student's 'Review Status' must be complete to be selected for mass packaging. Apparently, the Campus Logic mod is in UAT for testing – It's needed this in PRD ASAP. Aside from the process flow, these questions remain:
    a. How is checklist 105CL currently getting assigned?
    b. Some 105CL checklists are completed (not initiated) by FABATCH and others by individual user IDs – Determine how/why?
3. Top Priority – New aid Year fall/spring packaging
    a. Test packaging plans
    b. Test letter codes – Award Letter

      c. Amanda - Confirm new year fiscal item type setup – SEOG, FWS, etc. Campus allocations – Ask FAOs for their college allocations by item type

      d. Check install page – Re: NSLDS source

      e. Include NSLDS request, UEM, etc.

4. Summer Packaging – Plans to process another round of batch packaging for new students and another repackaging process for continuing students (excluding LTHT). Also, 18 mismatches to be corrected. Confirm Summer Thank You emails

5. Misc. topics:

      a. How are students (for example 30008289 – Owning school is MCC) without an ISIR getting aid year activated? Manually or batch?

      b. General question – When we package for fall/spring do we want to award Pell at FT as opposed to FA Load (as students may be partially enrolled in fall already

FA Processing 7-8-21

1. Update on FA Term and Budgets:

      a. FA Term/Budgets are now built correctly for the new year fall/spring

      b. Angie is checking the results. No comment from others

      c. Campus FAOs have been alerted and asked to review the budgets

      d. Not yet explained – Approx. 140 students showing enrolled FT in fall term 1214 but have 'No Unit Load' – Therefore, no budget build – But there is a budget for spring term 1222 based on projected enrollment. Answer – The students were enrolled and dropped classes

2. Campus Logic – Meeting scheduled this afternoon from 1:00-1:3030-5:00 Pacific RE: Campus Login Process Navigation (Charin, Richard, Hemanth) Roderick? Should anyone representing the colleges participate?This meeting is important as student's 'Review Status' must be complete to be selected for mass packaging. Apparently, the Campus Logic mod is in UAT for testing – It's needed this in PRD ASAP. Aside from the process flow, these questions remain:

      a. How is checklist 105CL currently getting assigned?

      b. Some 105CL checklists are completed (not initiated) by FABATCH and others by individual user IDs – Determine how/why?

3. Top Priority – New aid Year fall/spring packaging

      a. Tested packaging plans – Those tested were good! However, very few students are selected for packaging – Richard to review selection criteria

      b. Angie approved mass packaging results for COA. Joseph has not responded

      c. Test letter codes – Award Letter – One more test requiredto pick up latest updates

      d. Amanda - Confirm new year fiscal item type setup – SEOG, FWS, etc. Campus allocations – Ask FAOs for their college allocations by item type

      e. Check install page – Re: NSLDS source

   f. Include NSLDS request, UEM, etc.

   g. Hemanth to check the FWX (Exit Counseling) and FDP (Loan Disb) letter templates

  4. Summer Packaging – Plans to process another round of batch packaging for new students and another repackaging process for continuing students (excluding LTHT). Also, 18 mismatches to be corrected. Confirm Summer Thank You emails

  5. Misc. topics:

   a. How are students (for example 30008289 – Owning school is MCC) without an ISIR getting aid year activated? Manually or batch?

   b. General question – When we package for fall/spring do we want to award Pell at FT as opposed to FA Load (as students may be partially enrolled in fall already) – Answer – Yes, package Pell Full Time until beginning of term – Check this against disbursement dates

  6. Hemanth – Please follow upon Loan's email regarding BOG Loss Evaluation Run for Spring 2021 Term

FA Processing 7-12-21

  1. Discuss options for upfront verification of Pell/DL originations prior to sending to COD as discussed at last week's FA Director's meeting:

   a. Use of Pell Origination Validation report – For example, this report will identify validation errors such as incorrect ATB code

   b. Validation:

This feature checks origination and disbursement data in Manage Pell Payment component for statuses and failed validation errors.

   c. Example of Pell Grant Validation Edits:

Origination Validation Edits

Address invalid or incomplete

Citizenship not U.S. citizen or eligible non-citizen

Date of Birth format invalid

SSN not all numeric or at least 9 digits

Student Eligibility Code not present or invalid

2. Update on FA Term and Budgets:
   a. The JobSet to build FA Terms and Budgets for all terms in the EVEN aid year 2022 is now scheduled and runs daily at 10:00PM PDT. Accurate budgets are required prior to packaging

3. SAP – The SAP process for new and continuing students was run on Friday 7/9. Student's SAP status for the fall term is required prior to packaging. Note the following:
   a. The SAP process is not yet scheduled for daily processing
   b. Only the SAP itself has been run. SAP communications (emails) have not been processed pending review and upfront notification to FAOs to expect calls/appeal request
   c. Approx. 1000 students have a SAP status of U (Undetermined) – This needs review as all students should have a determined status

4. Fall/Spring Mass Packaging update:
   a. The setup for processing is complete
   b. On Friday 7/9 each campus FAO was emailed a request to confirm the results of an initial mass packaging batch run in 'Simulation' mode. This is to ensure accuracy prior to the run in 'Live' mode
   c. System processing errors prevented additional mass packaging on 9/10 and 9/11
   d. Help Desk Ticket # 133335 was submitted on 7/11
   e. Once successful with packaging, the FA Award letter will be tested a final time then sent to packaged students

      f.   Amanda - Confirm new year fiscal item type setup – SEOG, FWS, etc. Campus allocations – Ask FAOs for their college allocations by item type
      g. Check install page – Re: NSLDS source
      h. Include NSLDS request, UEM, etc.
      i.   Hemanth to check the FWX (Exit Counseling) and FDP (Loan Disb) letter templates

5. Summer Packaging – Each campus FAO was emailed with a query listing LTHT students to be auto awarded the summer packaging plan and then adjust the Pell amount.
      a. Students with a campus mismatch need to be corrected
      b. Richard sent an email to Roderick requesting help changing the FA Term Campus

6. Summer Term Repackaging update:
      a. Setup is being modified to not repackage LTHT students because:
          i.   The system awards an incorrect amount $793 for LTHT students
          ii. Campus staff may have already repackaged with the correct amount
          iii. Concern remains for the need to repackage greater than half time students who became LTHT – A query can identify these students and colleges can repackage individually by student
          iv. Although some repackaging took place Sunday 7/11, additional process was prevented by system processing errors
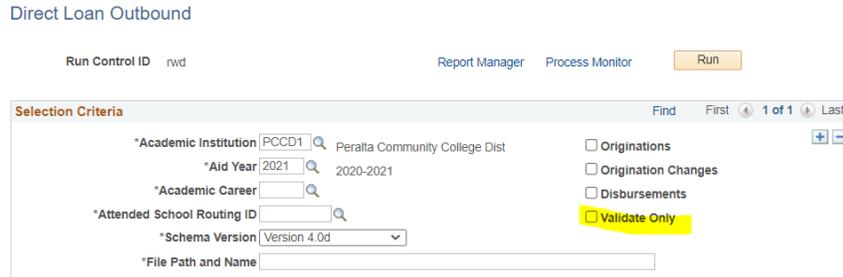
7. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. This needs review

8. Campus Logic – Friday's meeting with Campus Logic resulted in the creation of files from Campus Logic necessary for Charin to advance the mod to update a student's status based on codes submitted by Campus Logic

9. Hemanth – Please follow upon Loan's email regarding BOG Loss Evaluation Run for Spring 2021 Term

FA Processing 7-13-21

1. Discuss options for upfront verification of Pell/DL originations prior to sending to COD as discussed at last week's FA Director's meeting:

    a. Use of Pell Origination Validation report – For example, this report will identify validation errors such as incorrect ATB code

ORACLE
Report ID: FAPELLOV

PeopleSoft

PELL Orig Validation Report

Page No.: 1 of 3
Run Date: 07/12/2021
Run Time: 05:25:43 AM

INSTITUTION: PCCD1   AID YEAR: 2021

Student ID	PELL Origination ID	PELL Origination Status	PELL Transmission Status	PELL COA	PELL Enroll Date	Total PELL Award	PELL EFC
10710726	606249194SI202100126700	O - Originated	R- Ready	$ 25265	2020-08-24	$ 6345	$ 0

Error Message: 994- Missing Value
Error Message: 198- Incorrect Ability To Benefit Code submitted

    b. Validation:

Direct Loan Outbound

Run Control ID   rwd   Report Manager   Process Monitor   Run

Selection Criteria   Find   First ◄ 1 of 1 ► Last

*Academic Institution PCCD1 Peralta Community College Dist   ☐ Originations
*Aid Year 2021   2020-2021   ☐ Origination Changes
*Academic Career   ☐ Disbursements
*Attended School Routing ID   ☐ Validate Only
*Schema Version Version 4.0d
*File Path and Name

This feature checks origination and disbursement data in Manage Pell Payment component for statuses and failed validation errors.

    c. Example of Pell Grant Validation Edits:

Origination Validation Edits

Address invalid or incomplete

Citizenship not U.S. citizen or eligible non-citizen

Date of Birth format invalid

SSN not all numeric or at least 9 digits

Student Eligibility Code not present or invalid

2. Campus Logic – The 2022 Home Campus process generating CL SSO lists is now activated. Not being enabled prevented new students from logging in – Thanks to Loan for bringing this to our attention

3. SAP – The SAP process for new and continuing students was run on Friday 7/9. Student's SAP status for the fall term is required prior to packaging. Note the following:
    a. The SAP process is not yet scheduled for daily processing. After today's manual processing, Roderick will create a scheduled JobSet
    b. Only the SAP itself has been run. SAP communications (emails) have not been processed pending review and upfront notification to FAOs to expect calls/appeal request – SAP communications/checklist assignment are targeted for today
    c. Approx. 1000 students have SAP status of U (Undetermined) – This needs review as all students should have a determined status

4. Fall/Spring Mass Packaging update:
    a. IT is working with Oracle to identify cause of system processing errors preventing mass packaging
    b. Today, Richard will propose the packaging JobSet for Roderick to create. This will be tested as a workaround to avoid processing errors
    c. On Friday 7/9 each campus FAO was emailed a request to confirm the results of an initial mass packaging batch run in 'Simulation' mode. This is to ensure accuracy prior to the run in 'Live' mode. Responses from Loan and Angie have been helpful – Resulting n a review of Pell processing setup
    d. Once successful with packaging, the FA Award letter will be tested a final time then sent to packaged students
    e. Amanda - Confirm new year fiscal item type setup – SEOG, FWS, etc. Campus allocations – Ask FAOs for their college allocations by item type
    f. Check install page – Re: NSLDS source
    g. Include NSLDS request, UEM, etc.
    h. Hemanth to check the FWX (Exit Counseling) and FDP (Loan Disb) letter templates

5. Campus Mismatch – Richard and Roderick finally determined the cause of the mismatch. The selection query to assign the packaging variable keyed off ISIR Owning school code. The source s/b the Program/Plan campus. Appropriate changes will be made to this term specific variable (i.e. fall/spring/summer). Action: Richard to propose query modification for Roderick to review

6. Summer Packaging – Each campus FAO was emailed with a query listing LTHT students to be auto awarded the summer packaging plan and then adjust the Pell amount.
    a. Students with a campus mismatch need to be corrected
    b. Richard sent an email to Roderick requesting help changing the FA Term Campus

7. Summer Term Repackaging update:
    a. Setup is being modified to not repackage LTHT students because:
        i. The system awards an incorrect amount $793 for LTHT students
        ii. Campus staff may have already repackaged with the correct amount
        iii. Concern remains for the need to repackage greater than half time students who became LTHT – A query can identify these students and colleges can repackage individually by student
        iv. Although some repackaging took place Sunday 7/11, additional process was prevented by system processing errors

8. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. This needs review

9. Hemanth – To follow upon Loan's email regarding BOG Loss Evaluation Run for Spring 2021 Term

FA Processing 7-14-21

7. Discuss options for upfront verification of Pell/DL originations prior to sending to COD as discussed at last week's FA Director's meeting:
    a. Use of Pell Origination Validation report – For example, this report will identify validation errors such as incorrect ATB code

ORACLE	PeopleSoft	Page No.: 1 of 3
Report ID: FAPELLOV	PELL Orig Validation Report	Run Date: 07/12/2021 Run Time: 05:25:43 AM

INSTITUTION: PCCD1   AID YEAR: 2021

Student ID	PELL Origination ID	PELL Origination Status	PELL Transmission Status	PELL COA	PELL Enroll Date	Total PELL Award	PELL EFC
10710726	606249194SI202100126700	O - Originated	R- Ready	$ 25265	2020-08-24	$ 6345	$ 0

Error Message: 994- Missing Value
Error Message: 198- Incorrect Ability To Benefit Code submitted

    b. Validation:

Direct Loan Outbound

Run Control ID rwd   Report Manager   Process Monitor   [Run]

Selection Criteria		Find First ◀ 1 of 1 ▶ Last
*Academic Institution	PCCD1 🔍 Peralta Community College Dist	☐ Originations
*Aid Year	2021 🔍 2020-2021	☐ Origination Changes
*Academic Career	🔍	☐ Disbursements
*Attended School Routing ID	🔍	☐ Validate Only
*Schema Version	Version 4.0d ▾	
*File Path and Name		

This feature checks origination and disbursement data in Manage Pell Payment component for statuses and failed validation errors.

   c. Example of Pell Grant Validation Edits:

      Origination Validation Edits

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8. Campus Logic – The 2022 Home Campus process generating CL SSO lists is now activated. Not being enabled prevented new students from logging in – Thanks to Loan for bringing this to our attention

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   a. The SAP process is not yet scheduled for daily processing. After today's manual processing, Roderick will create a scheduled JobSet
   b. Only the SAP itself has been run. SAP communications (emails) have not been processed pending review and upfront notification to FAOs to expect calls/appeal request – SAP communications/checklist assignment are targeted for today
   c. Approx. 1000 students have SAP status of U (Undetermined) – This needs review as all students should have a determined status
   d. Summer SAP JobSet has been stopped (Inactivated) – This will prevent communications for fall being sent to summer students – IOW, only running one term's SAP process at a time. Same concept with mass packaging – Only one mass packaging at a time to prevent sending communications reading fall/spring AY 2022 to summer 2021 students

10. Fall/Spring Mass Packaging update:

     a. IT is working with Oracle to identify cause of system processing errors preventing mass packaging

     b. Today, Richard will propose the packaging JobSet for Roderick to create. This will be tested as a workaround to avoid processing errors

     c. On Friday 7/9 each campus FAO was emailed a request to confirm the results of an initial mass packaging batch run in 'Simulation' mode. This is to ensure accuracy prior to the run in 'Live' mode. Responses from Loan and Angie have been helpful – Resulting in a review of Pell processing setup of FA Install Page vs. Aid Rule St. It has been decided to award Pell based upon a student's FA Load

     d. Once successful with packaging, the FA Award letter will be tested a final time then sent to packaged students

     e. Amanda - Confirm new year fiscal item type setup – SEOG, FWS, etc. Campus allocations – Ask FAOs for their college allocations by item type

     f. Check install page – Re: NSLDS source

     g. Include NSLDS request, UEM, etc.

     h. Hemanth to check the FWX (Exit Counseling) and FDP (Loan Disb) letter templates

11. Campus Mismatch – Richard and Roderick finally determined the cause of the mismatch. The selection query to assign the packaging variable keyed off ISIR Owning school code. The source s/b the Program/Plan campus. Appropriate changes will be made to this term specific variable (i.e. fall/spring/summer). Action: Richard to propose query modification for Roderick to review. Students with a campus mismatch need to be corrected

12. Summer Term Repackaging update:
     a. Setup is being modified to not repackage LTHT students because:
          i. The system awards an incorrect amount $793 for LTHT students
          ii. Campus staff may have already repackaged with the correct amount
          iii. Concern remains for the need to repackage greater than half time students who became LTHT – A query can identify these students and colleges can repackage individually by student
          iv. Although some repackaging took place Sunday 7/11, additional process was prevented by system processing errors

13. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. This needs review

14. Hemanth - HEERF II MSI Fund Awarding Sheet Award Amount needs to be confirmed with Richard /Angie Harris.

The awarding criteria is as follows:

1. 2021 Fed ISIR or CA ISIR with 006720 College of Alameda school code
2. Students had to have an academic program/major at CoA for Spring 2021
3. Students had to be enrolled (districtwide) for Spring 2021
4. Included only ethnicities that qualify for AANAPISI or HIS

15. Hemanth – Responded to Loan's email regarding BOG Loss Evaluation Run for Spring 2021 Term and Loan requested list of students query to verify not meet academic standing

16. Hemanth- SEOG Awarding for Laney needs to be completed

17. Hemanth- LOAN Issues COA -Follow up with Oracle

18. Hemanth- Letter update the FWE and FP4 templates to read Fall 2021 - **DONE**

FA Processing 7-15-21

Today's top priority: Sending packaged students the Financial Aid Award Notification email

1. Fall/Spring Mass Packaging update:
   a. The initial Fall/Spring Mass Packaging was processed on 7/14/21
   b. No system processing errors were experienced
   c. The Mass Packaging JobSet will next be updated and activated
   d. The selection query PCCFA_AWARD_EMAIL does not select any students to assign the Financial Aid Award letter code. Troubleshooting the query is top priority in order to send award emails to students today

2. Roderick and Richard updated and activated 2022 processes to include the NSLDS requests, Transfer Monitoring and UEM Messages.
   a. Richard to revisit the processing of the FWX (Exit Counseling) and FDP (Loan Disb) letters

3. Campus Mismatch – Now that the source of the problem has been determined, Richard to propose query modification for Roderick to review. Students with a campus mismatch will be corrected

4. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. Richard to review and advise the way forward

FA Processing 7-16-21

1. Requested Fraud Application reporting status

2. Fall/Spring Mass Packaging update:
   a. FA Award Notification emails have been sent to 975 awarded students campus email
   b. The selection query PCCFA_AWARD_EMAIL had security limited to Abigail/Eugene. Richard and Hemanth have been added and the query now runs to success
3. Richard to revisit the processing of the FWX (Exit Counseling) and FDP (Loan Disb) letters
4. Campus Mismatch – Now that the source of the problem has been determined, Richard to propose query modification for Roderick to review. Students with a campus mismatch will be corrected
5. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. Richard to review and recommend the way forward
6. Campus Logic Update

   Angie
   16 hours ago
   Hi Richard, my team has a question about completing the verification process in CampusLogic. Once a process is completed in CL, you mentioned that it will update PeopleSoft too automatically. How long does it take for that action to happen? Is it right away or is there a delay?

7. Work with Amanda - **SEA item type for 2020-2021 need -** I increased the maximum amount to $2,000.00 in PS FA Item Type 982200950100 per Loan requested, but Loan received an error message when she tried to pay the below student

8. Loan's Request: **Since V-1 verification is not required, this means that all income tax checklists also need to disable along with the V-1 checklist.**
   Also, the selective service and drug conviction checklist items also need to be waived as well.
   Can you run a mass update to change those checklist items from "initiate" to "waived" status? when update the pending items to "waived" status, we need to also ensure the system recognizes the "waived" status as a complete item for packaging purposes. Campus logic also needs to update those checklists as well.
   Thank you.
   Loan
9. Update on HERF II, Loan, Merritt disbursements

FA Processing 7-21-21

19. Review summary of CARES awards with these takeaways:

In total, 595256 of budgeted funds have not been awarded as follows:
    407153 - Merritt
    119985 - Laney
    34833 - COA
    33285 – BCC
In total, 68800 of awarded funds have failed authorization as follows:
    44000 - Laney
    14800 - Merritt
    10000 - COA
    0 - BCC
    Note - Further analysis is being done to determine authorization failures
This totals 664056 in potential payments

20. Review 'Issues Found' as reported by Loan:

Below are some of the issues that staff found after reviewing those students that were packaged for 2021-22.

1. **The student was over 90 semester on dismissal but awarded**, for example, ID# 10890694
   (award canceled and appeal checklist was manually assigned)
2. **No high school but awarded**, example: ID#10997633
   (award canceled and checklist generated manually).
3. **Ineligible major/major mismatch but awarded**, example: ID#30006436
   (award canceled and checklist generated manually).
4. **All less than half-time awards are incorrect award amounts**.
   (staff will update to correct the award amount)

For SEOG, seem like it is awarded for full-time students only. Can you change the setup to award SEOG to all students who enrolled at least half-time (6 or more units)?
Please award spring SEOG to those students who didn't have the fall award as well.

Also, will there be any origination files to transmit for those awarded? The process should generate the origination file to transmit regularly? At this point, we didn't see any origination file for 2021-22 as of yet.

21. Requested Fraud Application reporting status – Roderick preparing query reports. Richard provided record names with required data. Next step – Roderick to produce query reports for review

22. VA Shopping Sheet Update – Responded to Loan and Jennifer with instructions to assign College Financing Plan Group and view Shopping Sheet. Next step – Confirm if Jennifer (and Veteran Services Program Coordinators) has access to assign Plan Groups and view Shopping Sheet. Ask Jennifer if Pop Update process will be helpful to

assign a large volume of Plan Groups – Results – This was a security access issue to be resolved when Jennifer returns

23. Richard to revisit the processing of the FWX (Exit Counseling) and FDP (Loan Disb) letters

24. Campus Mismatch – Now that the source of the problem has been determined, Richard to propose query modification for Roderick to review. Students with a campus mismatch will be corrected

25. Repackaging for aid year 20/21 continues to run in 'Simulation' mode. Richard to review and recommend the way forward

26. Campus Logic Update – Richard to respond to Angie. Also, check with Chiran on progress of Campus Logic mod
    Angie asked - Hi Richard, my team has a question about completing the verification process in Campus Logic. Once a process is completed in CL, you mentioned that it will update PeopleSoft too automatically. How long does it take for that action to happen? Is it right away or is there a delay?

27. Work with Amanda - SEA item type for 2020-2021 need - The maximum has been increased to $2,000.00 in PS FA Item Type 982200950100 per Loan requested, but Loan received an error message when she tried to pay the below student – Amanda – what is student ID? When I go to Aggregate Aid Limit in PS, it does not have an option for me to enter Item Type number 982200950100. When I click on the magnifying glass, SEA Emergency Grant was one of the choices. I updated $1,380.00 for Laney college about a week ago for Aggregate Aid Limit for SEA. Is there another form in PS that I can increase the maximum amount to $2,000.00 beside in FA Item Type?

28. Richard to respond to Loan's Request: Since V-1 verification is not required, this means that all income tax checklists also need to disable along with the V-1 checklist. Also, the selective service and drug conviction checklist items also need to be waived as well. Can you run a mass update to change those checklist items from "initiate" to "**waived**" status? when update the pending items to "waived" status, we need to also ensure the system recognizes the "waived" status as a complete item for packaging purposes. Campus logic also needs to update those checklists as well

29. Richard to assist Amanda in building FA Term for 10976223 & 10976215 if this is still an issue

FA Processing 7-26-21

1. Richard disbursed Laney's SEA Grant awards

2. Hemanth to award, via external awards, the Merritt HEERF II grant – 402 Pell students, 15 Dream Act students – Timing? Should we delay the batch Auth/Disb scheduled Monday morning at 9:00? Respond to Phasasha with expected payment date

3. 9:00 AM this morning - Richard and Roderick to review latest Batch Scheduled Jobsets schedule – Emphasis on processes to assign checklists for ineligible majors (run control PCCFA_FINMJF_E for the 3C Engine process in PCCFA_040. It seems the prompt s/b updated to Aid Year 2022 Term 1214 from 2021 /1204) and assign User Edit Messages

4. 9:30 this morning – Initial Laney College-Reconciliation Workgroup Zoom meeting – Review COD reconciliations

5. 11:00 this morning - Campus Logic Mod Update with Chiran - Discuss what's needed to get the mod active in PRD and have the student's 'Review' status updated

6. 11:30 this morning - Richard and Roderick to Update selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school. This will fix the home campus mismatch issue

7. Summer term ended 7/22. Richard to determine (asked Silvia Cortez) when grades are posted. Richard to adjust Fall SAP calculations to include summer grades and review students with an 'Undetermined' SAP status

8. Ongoing effort with Jackie/Amanda/Vu/Richard to determine cause of $700 reversal of EOPS Grant

9. Richard's Top Priority - Seemingly low number of students assigned fall/spring packaging plans

10. Richard to review Pell repackaging plans

11. Angie is coordinating a college review regarding the removal of due dates from checklist items – So far, COA and Merritt approve

12. Richard provided Angie and colleges the query to identify students with a V1 verification checklist and confirmed the ability to change the status from 'Initiated to 'Waived'. Angie and All - The query FA_PERSON_CHK_ITEM_FXXV1 lists students with a F21V1 and/or F22V1 checklist in a status other than 'Completed'. The system can waive checklists in batch if desired - Thanks, Richard

FA Processing 7-29-21

New items:

- Campus Logic Mod – Selection queries and resulting 105CL checklists have been assigned all 2022 FAFSA (9139) and CAL ISIR (262) in UAT for testing. Next, Charin will run the Campus Logic mod that will complete the 105CL checklist and 'Review' status for those students Campus Logic has reported as being verified

- Roderick and Richard have completed the checklist assignment processing for ineligible majors. It was being done for summer but not fall and spring

- Are we ready to assign the Shopping Sheet access to the PCCD92_FA_COUNSELOR role?

Ongoing Items:

13. Campus Logic Mod Update – Mod is complete and in UAT for testing. Expectations are: When ISIRs (Fed'l and Dreamer) are loaded, the FA_105CL checklist will be assigned to verification students. When Campus Logic reports the verification is complete, the initiated FA_105CL checklist in PSFT will be completed, the student's 'Review' status will be changed from the default 'Incomplete' to 'Review Complete' and the Database Matches will be overridden

14. The selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school. This will fix the home campus mismatch issue

15. Summer term ended 7/22. The deadline to submit most summer grades is this Thursday, July 29. The FALL SAP calculations will then include summer grades.

16. There continues to be 400 students with an 'Undetermined' SAP status listed in query: FA_STDNT_AID_ATRBT_SAP_U – Needs further review as these students would not get selected for Mass Packaging

17. Ongoing effort with Jackie/Amanda/Vu/Richard to determine cause of $700 reversal of EOPS Grant

18. Mass Packaging Fall/Spring 2021/2022 - Seemingly low number of students assigned fall/spring packaging plans. Top priority to review eligibility criteria

19. Summer packaging and Pell repackaging plans – Under review

FA Processing 7-30-21

New items:

1. Renewed system failures when running the FAPSAR00 ISIR Inbound process with this error:

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

2. Shopping Sheet access to the PCCD92_FA_COUNSELOR role?

3. Review support requests from yesterday's Financial Aid Meeting:
   a. Check 'Invalid Schema' in Direct Loan Export File – Causing errors
   b. Year End Cutoff
      i. August 20th – Last day for cutting checks
      ii. Stop packaging on August 20th
      iii. Stop assigning checklists 2 weeks prior – August 6th
   c. Request CCPG be Mass Packaged to all eligible students
      i. Apparently, this was done previously
      ii. Look in W Drive for eligibility documentation
   d. Activate Pell Outbound process ASAP – This will result in COD response files identifying Pell errors prior to disbursement (I recommend running the process in 'Validation' to determine errors prior to sending files to COD)
   e. SAP processing – Colleges requested email notification when SAP is 1st run with summer grades
   f. Confirm to colleges that the 500+ students with SAP status unidentified are continuing students. Confirm all new students have SAP status defaulted to Yes
   g. Mass Packaging and Repackaging – Email status update to colleges on Monday
   h. V1, Selective Service and Drug related checklists – Twofold request:
      i. Waive existing checklists – Confirm the waived status impacts the student's To Do listing
      ii. Modify existing process to continue to assign checklists but then waive the checklists
      iii. Colleges will manually assign the Selective Service checklist to Cal Grant students if required
   i. Campus Logic Mod – Request to revisit need to assign all ISIR and Cal ISIR students the 105CL checklist. Concern centered on potential time delay of response files from Campus Logic

4. Top Priorities:
   a. Mass Packaging Fall/Spring 2021/2022 - Seemingly low number of students assigned fall/spring packaging plans. Top priority to review

eligibility criteria – REMINDER – The 1st Pell disbursement is scheduled for 8/13/21 – Two weeks from today

b. RICHARD – Double check subsequent disbursement date setup!

c. Summer packaging and Pell repackaging plans – Under review

d. SAP:

    i. Summer term ended 7/22. The deadline to submit most summer grades is this Thursday, July 29. The FALL SAP calculations will then include summer grades

    ii. There continues to be 400 students with an 'Undetermined' SAP status listed in query: FA_STDNT_AID_ATRBT_SAP_U – Needs further review as these students would not get selected for Mass Packaging

e. Authorization Error Query – To be scheduled and distributed to colleges daily

f. The selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school. This will fix the home campus mismatch issue

g. Ongoing effort with Jackie/Amanda/Vu/Richard to determine cause of $700 reversal of EOPS Grant

FA Processing Update 7-26-21

1. Laney's SEA Grant awards have disbursed – Next refund process is Wednesday 7/28

2. The Merritt HEERF II grant – 402 Pell students, 15 Dream Act students have been awarded – Disbursement targeted completion prior to the next refund process Wednesday 7/28

3. Current review of processes to assign checklists for ineligible majors - Specifically the FINMJF as pointed out by Loan as follows: Ineligible major/major mismatch but awarded, example: ID#30006436 (award canceled and checklist generated manually)

4. Monday 7/26 was the initial Laney College-Reconciliation Workgroup Zoom meeting – Review COD reconciliations – Now regularly scheduled on Mondays

5. Campus Logic Mod Update – Mod is complete and in UAT for testing. Expectations are: When ISIRs (Fed'l and Dreamer) are loaded, the FA_105CL checklist will be assigned to verification students. When Campus Logic reports the verification is complete, the initiated FA_105CL checklist in PSFT will be completed, the student's 'Review' status will be changed from the default 'Incomplete' to 'Review Complete' and the Database Matches will be overridden. The checklist description is 'CampusLogic Forms Complete'. There are no comments – Discuss if the student should s this checklist

6. Access to the FA Shopping sheet is being assigned to the PCCD92_FA_COUNSELOR role as requested by Jennifer Lenahan

7. The selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school. This will fix the home campus mismatch issue

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11. Mass Packaging Fall/Spring 2021/2022 - Seemingly low number of students assigned fall/spring packaging plans. Top priority to review eligibility criteria

12. Pell repackaging plans – Under review for all terms

13. Angie is coordinating a college review regarding the removal of due dates from checklist items – So far, COA, Merritt and Laney have expressed approval to remove the due dates. Bcc is considering specific dates for certain checklists

14. All colleges have been provided the query FA_PERSON_CHK_ITEM_FXXV1 that lists students with a F21V1 and/or F22V1 checklist in a status other than 'Completed'. The system can waive checklists in batch if desired. Once decided, going forward, the system can assign and waive the V1 checklist. Similar actions can be taken for the Selective Service and Drug related checklists

FA Processing Update 7-28-21

New items:

- Merritt HEERF II grant awarded and disbursed – Good job Hemanth with the External Awarding!

- Specific help requested in these areas: CampusLogic run controls to assign 105CL checklist and assignment of Ineligible Major checklists

- Financial Aid Shopping Sheet need for current VA students – See Teresa's email below - Is it ok to assign the Shopping Sheet access to the PCCD92_FA_COUNSELOR role?

  Hi Richard,
  The security doesn't only assign to a particular user id. The security is assign to a role. A role is a collective of user ids. Jennifer Lenahan is in PCCD92_FA_COUNSELOR role. In this PCCD92_FA_COUNSELOR role is assigned to all counselors. Are you asking to assign this role? Also the shopping sheet page is a hyper link from the Financial Aid Inquiry page. When

the shopping sheet page is enable which means all the link in the Financial Aid Inquiry page will be enable. ==Please see all the screenshot below highlighted all the hyper link will be enable and please kindly provide the approval security will be assign to all counselors in the PCCD92_FA_COUNSELOR role.==

Ongoing Items:

20. Laney's SEA Grant awards have disbursed – Next refund process is Wednesday 7/28

21. The Merritt HEERF II grant – 402 Pell students, 15 Dream Act students are expected to be disbursed prior to the next refund process Wednesday 7/28

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