Examples of Daily Worklists for FA with Edgerock (August 2-5, 2021)

FA Processing 8-2-21

New items:

1. Roderick – Activate Pell Outbound process ASAP?
2. Roderick - Production Error Priority - Renewed system failures when running both Mass Packaging and the FAPSAR00 ISIR 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
```

3. SAP - Of the 690 students with SAP status of Undetermined, 334 are new students whose SAP should default to Meets – Richard to review this issue 1st then run SAP with summer grades

4. Roderick - Please interpret the Message Log for instance 9459840. It has 773 rows seemingly dealing with campus match/mismatch criteria – Richard has determined this is not an issue because the system passes all students and only selects the ones from the campus requested – All others are 'Mismatch'. However, the mismatch between FA Term, Pgm/Plan and ISIR Owning campus still exists. Please update selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school

5. Roderick - The new aid year 2021/2022 disbursement dates originally set up in UAT are not in PRD or UAT. Can they be found and moved to PRD?

6. Mass Packaging: Top Priority
   - Ernesto - Mass Packaging ran on 7/31 . Please review the details of batch number 3211 that packaged 2 students
   - Jennifer, Joseph - Mass Packaging ran on 7/31 . Please review the details of batch number 3207 that packaged 210 students
   - Angie - Mass Packaging ran on 7/31 . Please review the details of batch number 3211 that packaged 20 students
   - Loan - Mass Packaging ran on 7/31 . Please review the details of batch numbers 3201 and 3203 that represent 21 students

7. Review support requests from last week'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 – UNDER REVIEW – Many are 1st year students who should default to Meets
- g. Mass Packaging and Repackaging – Email status update to colleges on Monday - DONE
- 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

8. 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

FA Processing 8-2-21

New items:

1. SAP – The newly scheduled SAP process PCCFA058 successfully ran this morning at 6:00
2. Now the SAP is running, all new students have the defaulted SAP status of Meets SAP and not Undetermined – Richard to confirm this with the colleges
3. The SAP calculation now includes summer grades – The colleges have been notified as requested
4. Roderick – Yes, please cancel the daily_1AM recurrence of SFA_SAP_BDRV because it is now run as part of PCCFA058
5. PSNT5 Server – PSNT5 is an invalid server. It was valid before 9.2 when Peralta processed PeopleSoft internally. Now that Oracle Cloud hosts the system, the primary server/operating system is PSUNX/UNIX
6. The use of PSNT5 server resulted in jobs not being run or repeated processing failures.
7. Roderick to ensure PSNT5 is no longer specified
8. Roderick to create new FA run controls where necessary
9. Roderick – Confirm the Pell Outbound process has been activated – PCCFA045 ran this morning at 5:00 and 5:30 for the Odd and Even years. Richard to notify the colleges this has been activated
10. Richard and Roderick successfully tested the Pell 'Validation Only process'. Richard to recommend its use to identify/fix Pell validation errors transmitting files to COD where they will be rejected. Once the majority of errors are identified/fixed, this won't be necessary
11. Roderick – Please update selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school (may need to specify term). This will fix the home campus mismatch between FA Term, PGM/PLN, and Packaging Variable
12. Richard to manually rebuild the disbursement dates if not available in instances other than PRD and UAT where they don't exist
13. Mass Packaging: Top Priority – This process will be scheduled JobSet this week after another manual process without errors
14. Review support requests from last week'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. 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

      e. 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

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

FA Processing Wednesday 8-4-21

1. Richard created two new 3C Engine processes to waive the V1 (1502) and Selective Service checklists (498). A 3rd process to waive the drug related checklists will be completed today. A ticket requesting a Component Interface was submitted but then cancelled once the 3C Engine proved to be the best delivered option
2. Richard will then ask Roderick to add the 3 new 3C Engine processes to the ISIR load JobSet to run after checklists have been assigned. This meets the college's request to continue to have the checklist assigned, but then waived
3. Richard to ask Roderick to activate the new aid year Fall/Spring Mass Packaging JobSet PCCFAB104/053 after another manual process is run today without processing errors (now that the PSNT5 server is not specified)
4. Summer packaging and Pell repackaging plans – Richard to review
5. Roderick – Any progress updating the selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school (may need to specify term)? This will fix the home campus mismatch between FA Term, PGM/PLN, and Packaging Variable
6. Roderick - Please revisit my request for assistance regarding how the checklist F22SAF is assigned. Query FA_PERSON_CHK_ITEM_F22SAF lists more than 2000 students with the checklist. The run control must be somewhere - I just don't see it in the Batch Scheduled Jobsets schedule as of July 26, 2021
7. Comment Category OLCCPG is set up in PRD along with the 3C Group of FUSR. The description can be changed, and comments added if desired
8. Pell reject R210 - Peralta appears to be using the correct COD Common Record XML Schema Version 4.0d for aid year 2021 and COD Common Record XML

Schema Version 4.0e for aid year 2022. Roderick and Jennifer to revisit the Pell reject R210 for further indication of the problem

9. Richard to manually rebuild the disbursement dates:
    a. REMINDER – The 1st Pell disbursement is scheduled for Thursday, August 19th – 15 days from today
    b. Richard to double check subsequent disbursement date setup and Authorization/Disbursement calendars

10. FA processing updates are now being sent to colleges with new information to share

11. Review support requests from last week's Financial Aid Meeting:
    a. Year End Cutoff
        i. August 20th – Last day for cutting checks
        ii. Roderick to inactivate the Job for 2021 packaging on August 20th
        iii. Roderick to inactivate the Job assigning F21checklists (and possibly others – TBD) 2 weeks prior – August 6th
    b. Request CCPG be Mass Packaged to all eligible students – Ongoing
    c. Campus Logic Mod – s/b tested in UAT soon - 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
    d. Authorization Error Query – To be scheduled and distributed to colleges daily

FA Processing Wednesday 8-5-21

1. Mass packaging processed manually with no system related errors – Yeah! Roderick will activate the new aid year Fall/Spring Mass Packaging JobSet PCCFAB104/053

2. Emphasis now on identifying reasons students were not selected for packaging. This is a similar approach identifying why certain awards did not authorize

3. Richard will soon ask Roderick to add 3 new 3C Engine processes to the ISIR load JobSet that will waive certain checklists after they have been assigned. This meets the college's request to continue to have the checklist assigned, but then waived

4. Summer packaging and Pell repackaging plans – Richard to review

5. Roderick – Any progress updating the selection query PCCFA_PACK_VAR_POP to use FA Term campus instead of ISIR owning school (may need to specify term)? This will fix the home campus mismatch between FA Term, PGM/PLN, and Packaging Variable

6. Roderick confirmed how the checklist F22SAF is assigned and will change the name of the run control to include the checklist name (for searching purposes)

7. Pell reject R210 - Peralta appears to be using the correct COD Common Record XML Schema Version 4.0d for aid year 2021 and COD Common Record XML Schema Version 4.0e for aid year 2022. Roderick and Jennifer to revisit the Pell reject R210 for further indication of the problem

8. Keep in mind - The 1st Pell disbursement is scheduled for Thursday, August 19th – 14 days from today
9. Review support requests from last week's Financial Aid Meeting:
    a. Year End Cutoff
        i. Roderick to inactivate the Job for 2021 packaging on August 20th – Richard to send email request
        ii. Roderick to inactivate the Job assigning F21checklists (and possibly others – TBD) 2 weeks prior – August 6 – Richard to send email request
    b. Request CCPG be Mass Packaged to all eligible students – Ongoing
    c. Campus Logic Mod – Ongoing – This is most important to have verified student's review status changed to 'Complete' so they will be picked up for packaging - 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
    d. Authorization Error Query – To be scheduled and distributed to colleges daily