

PCCCD

Financial Aid Follow Up

Dr. Marla Williams-Powell

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COD Reporting

BCC	COA	Laney	Merritt
generate a reject file to send to campuses - need training on "how to fix issues"	1 addtnl staff cross-trained as back up to primary	District review all COD functions (Pell, DL)	website support/IT
make orgin. disb. process automated	troubleshooting - rejected files (some can be addressed by staff, but other times IT and Analysts are needed (can take more than 15 days)	staff training needs	improve collaboration w/ BO and District
need more accuracy in PeopleSoft so all students are captured	manually update COD, print for audit trail ★		training for loans, Pell reject file

Direct Loan Reconciliation

BCC	COA	Laney	Merritt
file needed to merge disbursement dates and amts for cross checking between ED and PeopleSoft	reconcile as soon as DLSAS file is received ★	query for DL recon must be updated INCLDG updates to District and IT	updated process for DL reconciliation
need DL recon file in PeopleSoft	be proactive in checking COD instead of waiting for DLSAS file ★		
create automated report to send to campuses	1 staff back up for DL recon		
	DL recon tool created at District level is not working		
	no loan disbursement comm letters (compliance)		
	no exit comm letters (compliance)		

Return to Title IV

BCC	COA	Laney	Merritt
run R2T4 query regularly to complete within 45 days ★	daily query: student will show up months after withdrawal (possibly due to backdated drop or query error)	Zero R2T4 findings 2-3 years in a row ★	no back up R2T4
WF need last date of activity for the students	no backup of R2T4	1 staff member w/in BS in Accounting to process R2T4 w/in 45 day timeline	no training on how to process RT4 and on off withdrawals
activate PeopleSoft module on R2T4	unofficial withdrawal: time intensive and time sensitive (last day of academic activity but student/faculty unresponsive [80-90%]) (improvising - midpoint calc)	PeopleSoft modified for our instructions to put date of student withdrawal to help R2T4 processing	short term classes

Other Areas of Concern

BCC	COA	Laney	Merritt
SAP Issues: 1) not updating correctly, 2) major is mismatched, 3) CCPG waiver not capturing all students	SAP Issues: 1) student status not met but still disbursed, 2) students marked pending but all grades are in	internal audit support	no training (4 years) no audit training
letters not generated when students drop courses for student loan (student loan exit letter)	checklists are not created for some students	challenges w/ independent auditor: inequitable treatment among campuses	need for front desk counter staff
payroll not linked to work study system	Sp20 SAP warning! Disqual notices have not been sent out (compliance)	internal auditors had same firm for very long time: is there a time limit? inconsistent sample sizes	SAP Issues: accurate query warning
	some qualified students are not packaged		inaccurate payout PeopleSoft
	SAP Issues: requires students to self Id before able to manually fix (inconvenient to students and lowers FA 3# (SCFF))	District FA Director position necessary to coordinate systems and policy for colleges	3 1/2 years w/o FA Spvsr.
	CCP9 evaluation: some students did not get awarded - impacts SCFF	need to visit a campus logic college prior to implementation at Laney	IT support
		close working relationships with Business and Finance areas on reconciliation	FA Analyst support
		regular training and training manuals for FA	

CHALLENGES

1. Staffing levels are not equitable across (support staff vs leadership)
2. Loss of District Leadership (impacts guidance and support efforts)
3. Severe lack of training opportunities for successful operations
4. Strained workplace culture (trust, support, teamwork and motivation)
5. Employee burnout/feeling overwhelmed
6. Lack of support to engage in professional growth and development
7. Lack of communication and information sharing (word of mouth vs. documentation and timing)

CHALLENGES

7. Under-utilization of PeopleSoft system
8. Sensitivity around training among union members
9. Need organized documentation system for audit trail (tba)
10. Need standardized desk manuals for each campus office (as well as at the District level)
11. Excessive delay in campus support for system
12. Limitations of FA Analysts (access and knowledge)
13. Manual entries at various stages that should otherwise be system generated
14. Concerns of perception/reputation

Recommendations: Infrastructure

Communication

- District → campus leaders
campus leaders → staff
staff → students and community
- website
- regularly scheduled district-wide meetings
quarterly finance engagement
reporting review

Establish district team to review district policy and rule exceptions

Base campus staffing levels

- director
- supervisor
- specialist
- placement assistant
- clerical assistant
- student worker

Identify designated IT contact solely for FA needs:

- response time
- knowledge base challenges

Identify policy expert to manage common understanding and messaging

Team building support

Recommendations: Technology

Maximize use of PeopleSoft

- make efficient use of limited number of standardized reports
- create anomaly reports for reconciliation
- R2T4

Repair /update current query utilities

- overpayment
- SAP
- class drop
- direct loan reconciliation
- reports to capture all students
- avoid manual entries
- review process to maintain data integrity

Maximize use of repository

- SharePoint?
- Video FAQ?
- PPT FAQ?

Remote pc access – allows technicians to see and access client's remote desktop via active session queue

Temporary PeopleSoft support to train district super/advance users on complete functionality and support District system leads

Recommendations: Service

Implement prior year payment authorization for outstanding debt balance

- Protects FTES
- Reduces A/R balances

SAP policy revision to address imposed restrictions impacting student eligibility

Create district wide operational calendar

Establish regular district wide learning opportunities

Cross train at campus level to ensure back up staff capabilities

Create a point of accountability and support at the District

Enforce academic involvement - last day of attendance (grades F, I and W)

Address verification process (includes self identification for aid eligibility)

Create uniformed desk manual and auditable systems of record

Next Steps:



PCCD partnership journey in service of students...