



Reconciliation & Cash Management Taskforce

AGENDA

April 14, 2021

Attendees:

Dr. Siri Brown, VC Adil Ahmed, Abigail Umale, Tami Taylor, Marla Williams-Powell, Ernesto Nery, and Dr. Lilia Chavez

- **Check in**

- **Review the recommendations**
 - **Sub-Categories**

 - **Next Steps**
 - Dr. Brown agreed to **review the Excused Withdraw (EW) and the policy** and provide the information to respond to the Department of Education's (DOE) Recommendation 1.2: Review options for students to notify the school of the intent to withdraw. Include how to initiate the process of notification if the student is incapacitated in anyway. Dr. Brown agreed to **review the policy** and provide language for options for incapacitated students

 - Dr. Brown agreed to support **the limit to the Change the Major** across all four colleges.

 - Abigail & Ernesto agreed to update pg. 68 of the Policy and Procedure Handbook to reflect removing the "P" as an unearned attempted unit. Will add "attempted and unearned."

 - Abigail & Ernesto will coordinate with the Financial Aid Directors to update the PCCD Policies & Procedures Manual to include:
 - Return to Title IV
 - Satisfactory Academic Progress (SAP)
 - Any additional changes

 - For Fiscal Management VC Ahmed suggested that a taskforce be created to address the DOE recommendation 3.1, 3.2, and 3.3.

 - District and colleges agreed to collaborate to create the policies and processes.

3.1- Defining the roles and responsibilities in the administration of Title IV Cash Management.

3.2 Fiscal management policies and processes that are consistent across all platforms.

3.3 Write the processes for documenting Reconciliation and update the Policy and Procedure Manual.

- Dr. Chavez agreed to coordinate the taskforce meeting. The preferred date is for Monday, at 1 or 2 pm for a total of 2 hours.
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Reconciliation II Cash Management Taskforce Mtg.

Lilia Chavez <lchavez@peralta.edu>

Wed 4/14/2021 6:01 PM

To: Adil Ahmed <aahmed@peralta.edu>; Siri Brown <sbrown@peralta.edu>; Tami Taylor <tamitaylor@peralta.edu>; Marla Williams-Powell <mwpowell@peralta.edu>; Joyce Brown-Willis <jwillis@peralta.edu>; Abigail Angel Umale <aumale@peralta.edu>; Eugene Cheng <eugenecheng@peralta.edu>; Vu Nguyen <vnguyen@peralta.edu>; Lilian Pires <lpires@peralta.edu>; Derek Pinto <dpinto@peralta.edu>; Kevin Q. Tran <kqtran@peralta.edu>; Ernesto Nery <enery@peralta.edu>; Loan Nguyen <lnguyen@peralta.edu>; Angie Harris <aharris@peralta.edu>; Joseph Koroma <jkoroma@peralta.edu>; Ava Lee-Pang <alee@peralta.edu>; Fang (Alisa) J. Huang <fhuang@peralta.edu>; Mildred Lewis <mildredlewis@peralta.edu>; Amy H. Lee <ahlee@peralta.edu>; Brenda Johnson <bjohnson@peralta.edu>
Cc: David M. Johnson <dmjohnson@peralta.edu>; Tina Vasconcellos <tvasconcellos@peralta.edu>; Stacey Shears <sshears@peralta.edu>; Vicki Ferguson <vferguson@peralta.edu>

Greetings to all,

The Department of Education (DOE) has recommended that we as a District respond to the following recommendations:

- 3.1 Defining the roles and responsibilities in the administration of Title IV Cash Management.
- 3.2 Fiscal management policies and processes that are consistent across all platforms.
- 3.3 Write the processes for documenting Reconciliation and update the Policy and Procedure Manual.

At the request of VC Ahmed, I have been tasked to coordinate the initial meeting of the Reconciliation and Cash Management Taskforce. The DOE specified that the roles and responsibilities need to include staff from all colleges and the District Office. Your role is key to the Cash Management process and your input is essential to the development of the process workflow. Upon completion of this task the evidence will be submitted to the Department of Education to ensure compliance for the Peralta Community College District. The meeting will be held on Monday, April 19, 2021, from 2 to 4 pm link to follow.

In Community,

L. J. Lilia Chavez

Vice President of Student Services

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**To book an appointment to meet with me click [HERE](#).

AP Change to Students Major--Fin Aid Implicaitons

Siri Brown <sbrown@peralta.edu>

Wed 4/14/2021 5:02 PM

To: Lilia Chavez <lchavez@peralta.edu>; Tina Vasconcellos <tvasconcellos@peralta.edu>; Vicki Ferguson <vferguson@peralta.edu>; Stacey Shears <sshears@peralta.edu>

Cc: Joseph Bielanski <jbielanski@peralta.edu>

Greetings VPSS and Joseph, The DOE has informed us that we need to limit the number of times a student can change their major. Language is due Friday so I am going to change AP xxxx (looking at which one) to the following for now and allow it to go through shared governance which will give you all and others time to look into edits. Due to the limited time; Merritt can submit the draft changes to the DOE to show what we are doing.

I will limit the number of times to 2 times in an academic year and limit the dates for the change to "within the first 2 weeks of the semester (FA and SP) and 1 week (SU).

Joseph can you please do a quick search to see if there are an APs in the CCLC list that address this. Im looking at our APs and dont really see where this fits.

Until Africa is Free,

Siri Brown, Ph.D.

Vice Chancellor of Academic Affairs and Student Success

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**Peralta Community
College District**