PSFALT
Meeting
Documentation
2015/16

From the Office of
Associate Vice Chancellor, Student Services
Los Rios Community College District
Student Success at Los Rios

Taking Action to Ensure Protections for Student Financial Aid Programs

Executive Summary

Today there is an exhaustive body of regulations that govern financial aid eligibility, administration and operations, but of particular importance is a longstanding requirement that a college not award a student aid for classes that do not count toward a financial aid-eligible degree or certificate. Specifically, the Student Financial Handbook clarifies 34 CFR 668.2 and states, “you cannot award the student aid for classes that do not count toward his degree, certificate, or other recognized credential.”

The Los Rios Colleges have long requested that the District’s system functionality be developed to ensure that financial aid is only funding degree-applicable units. The financial risks associated with funding courses that are not degree applicable could mean sanctions for any of our colleges, including repayment and possible loss of the college’s ability to administer Title IV aid.

For students, it means staying on track to complete certificates and degrees, and:
- Fewer students will be denied aid due to reaching maximum timeframe (SAP).
- Fewer students should be impacted by Pell Grant limitation.
- Fewer students should lose their loan subsidies.
- Student program completion should improve.

Course Audit Software Automates Review of Eligible Courses/Programs

Over the course of several years, and in consultation with college financial aid administrators, system requirements have been identified. District personnel from IT began programming for certificate programs, which provided colleges with reports that allowed them to identify courses that were not degree applicable, or financial aid eligible. Students were notified and awards were adjusted manually.

Currently, a vendor under contract with the District to provide mobile app services for student enrollment indicated that it had a technology-based solution to identify courses that were not degree applicable or financial aid eligible. The vendor’s course audit software, along with the District’s existing degree audit tool, will use an automated process to ensure that the courses a student enrolls in will meet the requirements for federal financial aid.

Why now?

The U.S. Department of Education has named hundreds of colleges whose federal aid it has restricted because of concerns about their finances or compliance with federal requirements. Institutions are being closely watched to ensure they are using federal student aid in a way that is accountable to both students and taxpayers. The Los Rios Colleges are committed to ensuring that students can continue to pursue their educational goals with the support provided by federal financial aid, free of any risks that could jeopardize the Colleges’ ability to administer future federal grants and loans.

FOR MORE INFORMATION on financial aid oversight requirements, click here.
Timeline

Over the next several months considerable effort will be dedicated to ensuring that the systems are updated and accurate. The following revised timeline will allow the Colleges’ business process owners to continue to validate course data through reports that will be made available to college personnel with the initial disbursement for fall 2016. Beginning with the October registration cycle for spring 2017, the process will be automated; students will be notified about whether the courses they enrolled in are degree applicable and financial aid eligible.

![Timeline Diagram]

Acknowledgements

A project of this magnitude would not be possible without the participation of many members of various stakeholder groups from the four Los Rios Colleges and the District Office. Much appreciation to the members of the District PeopleSoft Financial Aid Liaison Team, the PeopleSoft Financial Aid Technology Team, the Project Leadership Team, the Districtwide Financial Aid Advisory Committee and all the members of the College Implementation Teams.

Staff Contact

Please direct any questions or comments about the contents of this paper to Dr. Victoria C. Rosario, Associate Vice Chancellor, Student Services, Los Rios Community College District, at rosariv@losrios.edu.

For IT-related questions, please contact Joe Carrasco, Director, IT Systems & Programming, at carrasi@losrios.edu.

FOR MORE INFORMATION, go to  http://www.losrios.edu/student-services/index.php
DEGREE COMPLETION & UNIT APPLICABILITY

FEBRUARY 11, 2016

Revised April 26, 2016
DEGREE COMPLETION & UNIT APPLICABILITY
2016

OBJECTIVES

The financial aid offices in Los Rios receive an estimated 125,000 applications for federal financial aid each year. Many of these applicants, however, may never become students in Los Rios, or may not have the financial need, or are otherwise not eligible, to receive financial aid. Of the 125,000 applications received, approximately 24,000 will receive Title IV Federal Student Aid from a Los Rios college. While almost all of these students are eligible for the Board of Governors Fee Waiver (BOGFW).

Below is a chart that identifies the number of Title IV Financial Aid recipients in the Los Rios colleges.

<table>
<thead>
<tr>
<th>COLLEGE</th>
<th>TITLE IV FA RECIPIENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>American River College</td>
<td>9,898</td>
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<tr>
<td>Cosumnes River College</td>
<td>4,559</td>
</tr>
<tr>
<td>Folsom Lake College</td>
<td>2,036</td>
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<tr>
<td>Sacramento City College</td>
<td>7,427</td>
</tr>
<tr>
<td><strong>District Total</strong></td>
<td><strong>23,920</strong></td>
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*Table 1: Unduplicated FA Students 2014-2015*

While there is an exhaustive body of regulations that govern financial aid eligibility, administration and operations, of particular importance at this time is a long-standing requirement that a college cannot award a student aid for classes that do not count toward his/her degree or certificate. Specifically, the Student Financial Handbook clarifies 34 CFR 668.2 and states “you cannot award the student aid for classes that do not count toward his degree, certificate, or other recognized credential.”

The colleges have long requested that system functionality be reviewed to determine what is required to ensure that financial aid is only funding degree applicable units. The financial risks associated with funding courses that are not degree applicable could mean sanctions for the colleges including repayment and possible loss of the college’s ability to administer Title IV aid.

As such, members of the PeopleSoft Financial Aid Liaison Team discussed system functionality and possible solutions during their meetings in May 2015 through September 2015. Some of their objectives include:

- Provide timely information to students about what courses were applicable to the student’s program of study and therefore eligible for Title IV aid;
- Eliminate the requirement for a student to repay aid for classes that were not required but the student inadvertently received aid;

- Allow students the choice to take courses that were not applicable to their program of study which would give students the flexibility to take any course offered at any of the colleges whether or not they may be funded by financial aid.

- Provide timely information to students so they can make informed decisions about current and future aid eligibility such as Satisfactory Academic Progress (SAP), loss of loan subsidies, Pell Grant Usage limits;

- Provide a system where students could receive the aid for eligible courses without manual intervention when a student was also enrolled in courses that were not eligible for aid. The current process requires significant manual processing that delays aid to students who are enrolled in both courses that are applicable and are not applicable to the students program of study.

- Provide greater automation for identifying courses that were not applicable to the students program of study and properly account for remedial, ESL and repeat coursework.

- Provide a system that would let college staff override ineligibility as appropriate.

- Automatically adjust the student’s aid to the appropriate amount based on course applicability.

- Automatically stop funding a student’s program once it was determined to be completed.

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**PROGRAM EVALUATION AND TIMELINE TO DATE**

**Prior to June 2014**

The decision to implement Peoplesoft FA was made in part to meet this requirement. Trying to build interfaces between Powerfaids and Peoplesoft was inefficient. The decision to implement Peoplesoft FA dates back to our earliest discussions to implement PS financial aid.

**June of 2014**

The college VPSS, FA Administrators, FA Supervisors, IT and Deputy Chancellor Lorimer, AVC Rosario, and the Director of Financial Aid Systems met to discuss the need to make funding appropriate programs and courses a priority in the District.

**May 26, 2015**

IT discusses and provides recommendations to the PeopleSoft Liaison Team on how to approach the objectives. Degree Audit functionality as a tool for identifying course applicability first considered.

**Sept. 2015**

Colleges support a two phase approach to meeting the above objectives.

Phase I: Using Degree Audit, the colleges would be provided a report that identified applicable course units based on program requirements and course applicability rules for repeat, remedial and ESL. Colleges would take the data from the report and manually adjust the FA units at the course level that would in turn
adjust the enrollment status to the correct value and correct the amount of aid to be disbursed to students. Colleges would send individual notices to each student informing them of the change in eligibility. The identification of units was provided by a district developed report, but all adjustments and communications would be done manually.

Phase 2: Using the data from the report developed in Phase 1, the district would develop an automated process to adjust the FA units at the course level that would result in a change in enrollment status, and automatically send the student a communication.

Based on the go live date of April 1 proposed by the PeopleSoft Liaison Team, IT committed to having phase I done by the go-live date, but would make every attempt to have Phase 2 in production by the first disbursement date in August of 2016. The college voiced their need to have phase 2 in production.

October 2015 High Point Technologies found to be an affordable system that met project requirements. Functionality as a “bolt-on” was reviewed for compatibility with our current system and deemed acceptable. Product costs received by District on October 26. The options considered included: 1) build the interface ourselves; or outsource to High Point which was already contracted to provide mobile applications. This was a sole source contract so selecting from various vendors and products was not needed.

November 10 Authorization to purchase provided by Vice Chancellor of Finance and Administration.

**TOTAL FIRST-YEAR FEES**

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<th>If LRCCD selects the 1-year maintenance term option</th>
<th>Financial Aid Course Audit</th>
<th>$434,000</th>
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<td>· Product license</td>
<td>· Message Center</td>
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<tr>
<td>· Installation</td>
<td>· Financial Aid Automation</td>
<td></td>
</tr>
<tr>
<td>· Implementation</td>
<td>· Financial Aid Services</td>
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<tr>
<td>· Maintenance/Support for 1 year</td>
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November 17 Colleges provided notice that they would bear the cost of the High Point modifications. Colleges shared concerns about the cost of the product and how it would be implemented. The colleges requested a demo of the product.

November 18/
December 4 Vice Chancellor Matista meets with college VPAs to discuss and agree to purchase the High Point product.

December 4 Colleges provide BFAP budget strings for the purchase of ongoing maintenance. Colleges express their concern about not having the opportunity to demo the product to their campus constituents.

February 8 HighPoint demo to 55 district and college stakeholders representing a broad range of operational units including Business Services, Counseling, Enrollment Services, Financial Aid, and Instruction.
FUNDING

Colleges were requested to pay 50% of the maintenance and support fees for 2016-2017 award year; District Office would pay the product license fee, installation, and implementation. The colleges will be requested to pay the annual maintenance and support fees for the product. Based on prior year Pell percentages, the cost share by college is:

Identified as an area of critical need to address federal compliance needs on behalf of the colleges/District, VPAs and the VC Matista discussed that the cost of the initial implementation and installation ($339K) will be funded by the District Office. College BFAP programs funds will cover the ongoing costs for annual maintenance ($95K). It is noted that as the District transitions from PowerFaids, the BFAP programs will see savings in this line item as that maintenance cost ($135K) goes away. Due to BFAP budget requirements, the maintenance cost for Highpoint must be in place from day one to maintain that amount in BFAP expenditures in future years to avert supplanting.

The chart below describes the initial cost to the colleges for the 6-month development period of January – June 2016. The colleges have been requested to pay the annual maintenance and support fees for future years, which total approximately $95K.

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<th>College</th>
<th>Total</th>
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<td>FLC</td>
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<td>0.32</td>
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<tr>
<td>Total</td>
<td>$47,500</td>
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PROPOSED IMPLEMENTATION TIMELINE

Key to the success of the project is a timeline that ensures that: 1) data validation occurs; 2) impacted departments are provided the time and opportunity to define workflow and how to work with students; and 3) students receive timely and accurate communications prior to activation.

Validation Goals:

1. Degree Audit Course set-up is current and verified.
2. FA Remedial Rules and Repeat Rules verified.
3. Additional Exception Rules (courses) verified.

Validation Outcomes:

1. Degree Audit update process strengthened.
2. Confidence in FA Course Audit data.

3. Timely Notification to student of non-degree applicable/fundable courses.

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**ISSUES RAISED TO DATE**

1. Los Rios may be interpreting the regulations too stringently.

2. This process does not afford students flexibility to explore career options.

3. Prerequisite courses are only eligible for fee waivers and loans but not grants.

4. Degree Audit completeness.

5. Students should be able to be paid for courses they need at another institution that is not in any of our articulation agreements.

6. The counseling office may be inundated with students changing classes and students may not be able to get into the courses they need to receive federal aid.

7. Some courses are important for students to take but are not part of the program.

8. The purchase was not vetted.

9. Does not account for courses listed on outside transcripts.

10. Uncertainty on impact to enrollment when students are informed they will not receive aid for all their courses.

11. Transfer credit – we do not post equivalencies or GE to PeopleSoft, only units completed. This gives only a partial picture of the student's history. Students will not be treated equitably under this system.
12. Transfer credit for Math and English will be directed to Degree Audit if the transfer rule has the same course id from the external course as the one in Degree Audit.

13. GE (AA/AS and ADT) courses need to be evaluated by following the other school GE pattern.

14. Do not evaluate external transcripts on a course by course basis (we will start with English and math), rather only summary units.

15. Catalog Rights: transferring from another college; returning from another college; exit catalog right; split catalog rights.

16. D grade considered passing according to FA; implications for repeat rule processing.

17. Course substitution -- DA has this function; currently not using it, we can use it and enter course subs, as they come in. Only good for courses inside the district.

18. Ed goal is transfer no degree -- articulation agreements with four year schools are not in our degree audit programs. How will it work for these students?

19. Limiting students to one primary program rather than more than one degree and transfer to institutions with a double major.

20. Course directives -- degree audit will apply the first class taken to the first area where it can be used. This is often not the intention of the student. Classes that can be used in multiple areas could be used in the wrong area. Students will get a message that a class is not FA eligible, which could be incorrect.

21. Surprised evaluators/A&R and counseling were just recently brought into the discussion.

22. Almost every financial aid student will need an override, which will impact counseling, A&R and financial aid dramatically.

23. Given that nearly 7,000 of FLC students (roughly 80%) receive some sort of financial aid (this includes BOGW), we have a major concern the back log of students that will need to see a counselor to get their ed plans “validated” so an override can be done with financial aid.

24. Seems like the program is designed for four year colleges, where you have terminal majors and a set curriculum for a limited number of programs (not a community college, where 70% of our students are trying to transfer from here)

25. The prep for the same major differs from one college to the next (including two and four year colleges), so EVERY student has a unique ed plan based on their major requirements, transfer target schools, varying levels of remediation, electives, etc.

26. Degree audit does not capture transfer majors, and in fact, when a student selects a program in their Los Rios application (including supplemental applications), they can ONLY choose from programs that each college offers (AA,AS, ADT’s, certificates), which often times, fails to accurately reflect the “true” program of study while taking required preparatory classes in Los Rios (engineering is a prime example of this).

27. The report references degree audit being used as “the” tool to inform the course applicability as early as May 2015, but I looked back in my PeopleSoft liaison team notes (back to May 2015) and could find nothing about it. The majority of the report-outs only said that PS financial aid was on schedule.

28. This will definitely make it even more important that Instruction ensures the catalog is accurate and updates are provided to the evaluator/degree auditor in a timely manner. Our evaluator will most likely be under pressure to complete the catalog analysis and degree audit data input into PeopleSoft in much faster timeline.

29. On page 3, Sept. 2015 – Phase I, it says that using degree audit, the colleges would be provided a report that identifies applicable course units based on program requirements and course applicability rules for repeat, remedial and ESL. The fact is that degree audit was built to exclude remedial coursework because in determining a student's progress towards a degree/certificate (which is the original intent of degree audit), it is based on degree applicable coursework (units complete, GPA, residency).
30. On page 5, under validation goals, it says that one of the goals is that degree audit set-up is current and verified. . . . . and that happens in February. February— as in the month we’re in. The priority right now is evaluation of mandated ADT petitions— which will continue through March 15. After March 15, the next focus would be working to address set-up issues in degree audit.

31. There are degree programs that are too complicated to set up in degree audit and they would need to be evaluated manually (at FLC—Dance Studies, for example).

32. Much of what is being proposed involves “overrides” and manual intervention, you’re almost looking at a case management model for all financial aid students similar to EOPS and even veterans who require the full VA ed plan.

33. Will students know if the courses they pick are FA eligible at the time of registration? For instance, upon clicking the class they would like to take, will/can something be noted there so that the student will know immediately?

34. Undecided Major—according to Feds this is ok, we should allow exploration for a few semesters, especially considering SSSP allows undecided for up to 3 semester. A “program of study” as defined by DOE is an eligible educational goal.

35. What is the District overall goal, isn’t it to help students, not put up roadblocks for them as they try to finance their educational?

36. Can Research Office provide us with the # of students who will have an impact on this? This will negatively impact enrollment. Is District willing to take that on at this time, a significant decrease especially during a time where we are struggling to increase our enrollment numbers?

37. After this goes into effect, what is the District’s plan to bring enrollment back up?

38. If it is estimated that 25% of our population is on FA, can the District afford to lose up to 25% of the students?

39. How accurate is the Degree Audit?

40. Can we Go Live w/out the Course Applicability piece? Hold off on course applicability an additional year to test.

41. What happens if students changed their majors in the middle of the semester after we have funded them? Will we see if the change occurred?

42. What other colleges are using this product?

43. Have we spoken directly with DOE regarding these changes we want to implement?

44. While we could be out of compliance for paying for courses that a student may not need, at the same time, we may be out of compliance for not paying for a courses a student needs especially if we are reading regs to stringently.

45. Telling a student once they have registered that a class isn’t eligible for funding is too late, at times it will be impossible for them to add another course.
Areas to develop:

1. Expand PeopleSoft FA Liaison Team and Campus Implementation Team (CIT) membership to include faculty appointments and impacted operational units.

2. Expand meeting schedule to address adjustments to business processes.

3. Continue Set up/Validation.

4. Develop communications to students and college community.

5. Assess/adjust workflow and prepare for workload demands required for implementation.

6. Identify/track new and emerging issues from business units.
ADDENDUM 1: VERIFICATION PROCESS

Financial Aid Course Audit Verification Process (draft)

On weekend run FA course check

During the week

- Student enrolls in class. Attend class.
- Process checks to verify course is FA approved for student.
  - If approved, go to FA award adjusted automatically.
  - If not approved, proceed to follow-up process.

Follow-up process:
- Unrelated course:
  - Message sent to student.
  - Report generated for administrators.
  - Follow-up action can be taken.
- Related course:
  - Student directed to follow-up process.
  - Student has follow-up questions:
    - Yes: No further action required.
    - No: Student can drop and enroll in FA covered class.

Yes

No

FA award adjusted automatically
ADDENDUM 2: PROJECT MANAGEMENT

The structure of the PS FA Implementation project is that each college will establish its own College Implementation Team to review issues that are raised from college student, staff, faculty and administrators and to provide the colleges with the information that is being shared at the District Technology and Liaison Team meetings.

PS FA TECHNOLOGY TEAM

This committee consists of members appointed by the college, from each college, that has a greater understanding of the use of technology in the Financial Aid Office, an IT supervisor, IT analyst, Accounting Staff, and the Director of Financial Aid Systems. The purpose of this committee is to assist in the technical aspects of implementing PeopleSoft Financial Aid. Important to note, this committee does not make changes in policy or campus process, but clarifies the need for certain changes as it impacts the technical implementation of PeopleSoft. Identified changes to policy or practice discovered by this committee will be forward to the PS Financial Aid Liaison committee for consideration. Chair: Cindy Velez, IT Supervisor.

PS FINANCIAL AID LIAISON TEAM

This committee consists of members from various departments on campus and at the District Office. Members from the campus are appointed by the campus VPSS or designee. The purpose of this committee is to form recommendations on policy or process changes and forward these recommendations to the VPSS Council for adoption. The committee will be forwarded issues that need to have action to allow for continued PS financial aid implementation and the alignment of policy and processes throughout the District. Co-chairs: Christine Hernandez (SCC) and Chris Thomas (CRC).

PROJECT LEADERSHIP TEAM (PLT):

This team will receive recommendations from the PS FA Implementation Liaison Team and submit recommendations to the VPSS Council for adoption. This committee meets via conference call after the Liaison Committee meeting.

DW FINANCIAL AID ADVISORY COMMITTEE:

The purpose of this committee is to discuss agenda items and recommend appropriate action, resources, policy changes, or direction. The agenda is developed by changes in Federal, state, or institutional policies that impact financial aid, college and or district personnel submission of agenda items, changes in technology that may impact process or a request for enhancement in the use of technology. Chair: Roy Beckhorn, Director of Financial Aid Systems.

CAMPUS IMPLEMENTATION TEAMS (CIT)

These locally determined teams ensure that each college has a process for sharing information at the campus. The purpose of the CIT is to receive input from all constituents on campus and provide feedback on the progress and conversations that are taken place in the other implementation committees.
College Implementation Team (CIT) members:

**ARC:**
- Judy Mays
- Jeff Stephenson
- Robin Neal
- Dawn Siracusa
- Chad Funk
- Kolleen Ostgaard

**CRC:**
- Richard Andrews
- Tiffany Clark
- Ian Low
- Selena Martinez
- Shelly Massi
- Yolanda Garcia
- Phuong Le
- Aksone Lusanxay
- Teresa Aldredge
- Shannon Dickson

**SCC:**
- Christine Hernandez
- Kim Goff
- Elaine Ader
- Rukiya Bates
- Robert Heidt
- Daniel Kwong
- Marilyn Keefe Perry

**FLC:**
- Bernard Gibson
- Ali Padash
- Christine Wurzer
- Dave Hill
- Jim Cosentino
- Joany Harman
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<tr>
<td>Christine Hernandez</td>
<td>Student Srv</td>
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PowerFAIDs mailing

Target Group: All Financial Aid students currently enrolled to understand the importance of degree-applicability

Frequency: Two times a year approx. prior to registration

Subject: Are your courses degree-applicable?

Content: DRAFT with edits from the ISEP Work Group Meeting of 2/26/16

Los Rios
Community College District

Make your courses count for financial aid!

Dear Student,

The financial aid office would like to remind you that registration for the Summer and Fall semesters will be starting in April. To prepare here are some helpful tips and reminders to keep you on track.

Are your courses degree-applicable?
Now is a good time to review what courses you need to complete your program of study at your college. You may recall in your federal financial aid award letter that federal financial aid can only be used to cover the cost of courses that are applicable to your current program of study. If you are enrolled in courses outside of your program of study – they are not required – you will receive a notification indicating which courses are not eligible to receive financial aid.

Have you met with a counselor recently?
We encourage you to make an appointment with a counselor to discuss your goals and the appropriate courses for you to take. Typically, student’s wait times to see a counselor are less during non-peak times; making an appointment with a counselor now will eliminate the longer wait time as we get closer to the start of registration. You can prepare for this appointment by reviewing the online course catalog which is a great source of information and can help assist you in selecting the correct courses to enroll in that are applicable to your program of study. Click here or go to this link: http://www.losrios.edu/cgi-bin/lrc_cmnt.cgi

Have you viewed your My Academics tab in eServices?
As you await your appointment, be sure to go to your eServices account and click on the My Academics tab to print a copy of your Academic Advisement report. This report will show the progress you are making toward meeting degree or transfer requirements. This tool will help you understand the courses required and to help plan course selection for each term for your major and general education requirements. The report will also show you completed courses and courses in progress.

And lastly, don’t forget to renew your BOG Fee Waiver.
To have your fees waived, you must reapply every year for the BOG Fee Waiver. Once approved, the fee waiver is good for Summer, Fall, and Spring semesters. The fee waiver expires at the end of the Spring semester each year.

We care about your success, and look forward to assisting you as prepare for the upcoming terms.

The Los Rios Community Colleges
American River Cosumnes River Folsom Lake Sacramento City

Do not reply to this e-mail. It is for sending notices only
Degree Completion &
FA Course Applicability

3-1-2016
(Revised 8-26-2013)

What is changing?

Through the use of system and business processes limit financial aid funds to pay for only units that are required for a student’s approved program of study and provide students with a timely communication when they are enrolled in courses that do not qualify for financial aid.

History

• Federal policy.
• We have processes currently in place to assist in identifying these courses.
• This was one reason for moving into an integrated system.
• June 2014: We were tasked with finding automated methods for doing this.
• May-July of 2015: PS FA Liaison Team discussed the requirements with IT.
Federal Financial Aid Policy

Enrollment Status

Ref: 34 CFR 668.2
Department of Education’s 2015-2016 FSA Handbook, page 1-14
http://ifap.ed.gov/ifahandbook/attachments/156/OS/1Ch1.pdf

“If a student is enrolled in courses that do not count toward his degree, certificate, or other recognized credential, and they cannot be used to determine enrollment status unless they are eligible remedial courses. This means you cannot award the student aid for classes that do not count toward his degree, certificate, or other recognized credential.”

Why Now?


Student Data

2016/2015
CCCCCO Data Mart

<table>
<thead>
<tr>
<th></th>
<th>Art.</th>
<th>KRC</th>
<th>HIC</th>
<th>SCE</th>
<th>DW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshmen</td>
<td>24,484</td>
<td>4,950</td>
<td>7,520</td>
<td>7,277</td>
<td>57,091</td>
</tr>
<tr>
<td>Fee Waiver Recipients</td>
<td>26,720</td>
<td>15,600</td>
<td>6,460</td>
<td>7,977</td>
<td>78,783</td>
</tr>
<tr>
<td>Unidentified Entitled Students</td>
<td>42,004</td>
<td>10,050</td>
<td>10,900</td>
<td>33,049</td>
<td>125,725</td>
</tr>
</tbody>
</table>
Eligible Program of Study
(PPA and ECAR)

- All Associate Degree Programs offered at the college.
- All 2-year transfer programs that are offered at the college acceptable for full credit toward a bachelor’s degree.
- Certificate programs that have been approved by the Department of Education and are listed on the Eligibility and Certification Approval Report (ECAR).

Eligible Courses

- Courses required for the student's eligible program of study
- Course prerequisites for required courses
- Elective courses
- Remedial Units - up to 30 units
- Repeat course (per federal policy)
- ESL courses
Liability
(Based on EFC=0)

Full time Pell for a year is $5775.

<table>
<thead>
<tr>
<th>Units</th>
<th>Enrollment Status</th>
<th>Term Dollar Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 or more</td>
<td>Full time</td>
<td>$5775</td>
</tr>
<tr>
<td>9.0 - 11.5</td>
<td>Three-quarter</td>
<td>$2,180</td>
</tr>
<tr>
<td>6.0 - 8.99</td>
<td>Half time</td>
<td>$1,450</td>
</tr>
<tr>
<td>0.5 - 5.5</td>
<td>Less than half time</td>
<td>$510</td>
</tr>
</tbody>
</table>

The liability to the college is the difference between the amount paid and the amount the student was eligible to receive.

PS FA Liaison Team request of IT

- Provide timely information to students about what courses are applicable to the student's program of study and therefore eligible for Title IV aid.
- Minimize the requirement for a student to repay aid for classes that were not required but the student inadvertently received aid.
- Allow students the choice to take courses that are not applicable to their program of study, giving students the flexibility to take any course offered at any of the colleges whether or not they may be funded by financial aid.
- Provide timely information to students so they can make informed decisions about current and future aid eligibility such as Satisfactory Academic Progress (SAP), loss of loan subsidies, Pell Grant Usage Limits;

PS FA Liaison Team request of IT Continued:

- Provide a system where students could receive the aid for eligible courses without manual intervention when a student was also enrolled in courses that were not eligible for aid. The current process requires significant manual processing that delays aid to students who are enrolled in both courses that are applicable and are not applicable to the students program of study.
- Provide greater automation for identifying courses that are not applicable to the students program of study and properly account for remedial, ESL and repeat coursework.
- Provide a system that would let college staff override ineligibility as appropriate.
- Automatically adjust the student's aid to the appropriate amount based on course applicability.
- Automatically stop funding a student's program once it was determined to be completed.
Current Status

- Identify Eligible Program: Done
- Build communications: Done
- Remedial: Done
- ESL: Done
- Repeat Courses: In progress
- Override functionality: In progress
- Program Specific Req: In progress
- Prerequisite courses: In progress
- Electives: In progress
- Assist: In progress
- Transfer Credit: In progress

Resource Groups

- Campus FA Implementation Team
- PS FA Liaison Team Members
  - Financial Aid
  - Admissions and Records
  - College Administrators
  - Business Services
  - Open meetings
- VPSS/VPI/VPA
- IT / Evaluators
- Consultants
- Document storage: linkedToACity/abc/def/g/h/xyz/123.txt

Challenges

- Timeline
- Preparing Students, Staff and Faculty on this change.
- Unknown impacts on enrollment, programs, financial aid staff, and counselors.
- No funding for students for exploring various programs without changing programs.
Benefits for students

- Fewer students will be denied aid due to reaching maximum timeframe (SAP).
- Fewer students should be impacted by Pell Grant limitation.
- Fewer students should lose their loan subsidies. (SULA)
- Student program completion should improve. (Program completion rates should improve - Gainful Employment)

Before moving this process into production, we must validate that all the information given to a student is accurate and true.

Questions
<table>
<thead>
<tr>
<th>Issue #</th>
<th>Type</th>
<th>Issue Raised</th>
<th>Date Discussed</th>
<th>Discussion/ Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Policy</td>
<td>Los Rios may be interpreting the regulations too stringently.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel.</td>
</tr>
<tr>
<td>2</td>
<td>Policy</td>
<td>This process does not afford students flexibility to explore career options.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel.</td>
</tr>
<tr>
<td>3</td>
<td>Policy</td>
<td>Prerequisite courses are only eligible for fee waivers and loans but not grants.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14. Clarification: Prerequisites to getting into a program of study are only eligible for fee waiver and loans but not grants. Once accepted into a program of study, the prerequisites to courses in the program are fully eligible for federal financial aid.</td>
</tr>
<tr>
<td>5</td>
<td>Policy</td>
<td>Students should be able to be paid for courses they need at another institution that is not in any of our articulation agreements.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel. We are evaluating options for students enrolled in transfer programs.</td>
</tr>
<tr>
<td>7</td>
<td>Policy</td>
<td>Some courses are important for students to take but are not part of the program.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel.</td>
</tr>
<tr>
<td>13</td>
<td>Policy</td>
<td>GE (AA/AS and ADT) courses need to be evaluated by following the other school GE pattern.</td>
<td></td>
<td>34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel.</td>
</tr>
<tr>
<td>16</td>
<td>Policy</td>
<td>D grade considered passing according to FA; implications for repeat rule processing.</td>
<td></td>
<td>34 CFR 668.2(b). There is a difference in Title 5 (State) and Title IV (Federal) regulation pertaining to repeat coursework. Federal Regulations allow a student to receive federal aid for a course that has been successfully completed (grade of D or better) one time only. Students can be paid for repeating an unsuccessful course as long as the student is accepted in the program and is meeting all other requirements include Satisfactory Academic Progress.</td>
</tr>
<tr>
<td>No.</td>
<td>Type</td>
<td>Issue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Policy</td>
<td>Ed goal is transfer no degree — articulation agreements with four year schools are not in our degree audit programs. How will it work for these students?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Policy</td>
<td>Undecided Major—according to Feds this is ok, we should allow exploration for a few semesters, especially considering SSSP allows undecided for up to 3 semester. A “program of study” as defined by DOE is an eligible educational goal.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Policy</td>
<td>What is the District overall goal, isn't it to help students, not put up roadblocks for them as they try to finance their educational?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Policy</td>
<td>Will there be a limit on major changes?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Policy</td>
<td>In the major/plan, is there going to be a code for transfer only (other than the ones associated with an associate degree tied to it)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Policy</td>
<td>Limiting students to one primary program rather than more than one degree and transfer to institutions with a double major.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel. We are evaluating options for students enrolled in transfer programs.

34 CFR 668.2, Department of Education's 2015-2016 SFA Handbook, page 1-14, Legal counsel. The program of study in PS is the identified in the student's academic plan.

The District is committed to helping students and ensuring compliance with federal and state mandates.

Implications to SAP and future eligibility

This is currently in place for most colleges and can be set up by the college.

Executive level discussion
<table>
<thead>
<tr>
<th>Issue #</th>
<th>Type</th>
<th>Issue Raised</th>
<th>Date Discussed</th>
<th>Discussion/ Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>System Functionality</td>
<td>Will students know if the courses they pick are FA eligible at the time of registration? For instance, upon clicking the class they would like to take, will/can something be noted there so that the student will know immediately.</td>
<td></td>
<td>Current system functionality evaluates enrolled courses only. The student would need to be enrolled for the system to evaluate the applicability of courses. Discussion with Vendor.</td>
</tr>
<tr>
<td>31</td>
<td>System Functionality</td>
<td>Can we create an ability to see in a “what if” scenario if a course would be FA eligible?</td>
<td></td>
<td>Current system functionality evaluates enrolled courses only. The student would need to be enrolled for the system to evaluate the applicability of courses. Discussion with Vendor.</td>
</tr>
<tr>
<td>38</td>
<td>System Functionality</td>
<td>Is this a tab or message on E-services that students can see?</td>
<td></td>
<td>Notice will be available to the student in eServices.</td>
</tr>
<tr>
<td>Issue #</td>
<td>Type</td>
<td>Issue Raised</td>
<td>Date Discussed</td>
<td>Discussion/Consideration</td>
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<td>---------</td>
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<td>------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>15</td>
<td>Degree Audit Workgroup</td>
<td>Catalog Rights: transferring from another college; returning from another college; exit catalog right; split catalog rights.</td>
<td></td>
<td>validate rules</td>
</tr>
<tr>
<td>20</td>
<td>Degree Audit Workgroup</td>
<td>Course directives – degree audit will apply the first class taken to the first area where it can be used. This is often not the intention of the student. Classes that can be used in multiple areas could be used in the wrong area. Students will get a message that a class is not FA eligible, which could be incorrect.</td>
<td></td>
<td>validate rules</td>
</tr>
<tr>
<td>27</td>
<td>Degree Audit Workgroup</td>
<td>How accurate is the Degree Audit?</td>
<td></td>
<td>Using both DA and course applicability module we will account for remedial, ESL, Electives, Required courses, Prerequisite courses.</td>
</tr>
<tr>
<td>37</td>
<td>Degree Audit Workgroup</td>
<td>Can a counselor be assigned to the program eligibility team?</td>
<td></td>
<td>Yes-Lydia Delgado.</td>
</tr>
<tr>
<td>4</td>
<td>Degree Audit Workgroup</td>
<td>Degree Audit completeness.</td>
<td></td>
<td>Using both DA and course applicability module we will account for remedial, ESL, Electives, Required courses, Prerequisite courses.</td>
</tr>
<tr>
<td>Issue #</td>
<td>Type</td>
<td>Issue Raised</td>
<td>Date Discussed</td>
<td>Discussion/Consideration</td>
</tr>
<tr>
<td>---------</td>
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<td>--------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>9</td>
<td>Workload Assessment</td>
<td>Does not account for courses listed on outside transcripts.</td>
<td></td>
<td>Summary versus equivalency courses entered.</td>
</tr>
<tr>
<td>10</td>
<td>Workload Assessment</td>
<td>Uncertainty on impact to enrollment when students are informed they will not receive aid for all their courses.</td>
<td></td>
<td>Increase contact with students to mitigate loss of enrollment. Report of non applicable units to the college in August.</td>
</tr>
<tr>
<td>11</td>
<td>Workload Assessment</td>
<td>Transfer credit – we do not post equivalencies or GE to PeopleSoft, only units completed. This gives only a partial picture of the student’s history. Students will not be treated equitably under this system.</td>
<td></td>
<td>Summary versus Equivelocity courses entered.</td>
</tr>
<tr>
<td>12</td>
<td>Workload Assessment</td>
<td>Transfer credit for Math and English will be directed to Degree Audit if the transfer rule has the same course id from the external course as the one in Degree Audit.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Workload Assessment</td>
<td>Do not evaluate external transcripts on a course by course basis (we will start with English and math), rather only summary units.</td>
<td></td>
<td>Delay recommendation.</td>
</tr>
<tr>
<td>17</td>
<td>Workload Assessment</td>
<td>Course substitution – DA has this function; currently not using it, we can use it and enter course subs, as they come in. Only good for courses inside the district.</td>
<td></td>
<td>Counselor and/or Instruction Office workload issue.</td>
</tr>
<tr>
<td>24</td>
<td>Workload Assessment</td>
<td>Can Research Office provide us with the # of students who will have an impact on this? This will negatively impact enrollment. Is District willing to take that on at this time, a significant decrease especially during a time where we are struggling to increase our enrollment numbers?</td>
<td></td>
<td>Increase contact with students to mitigate loss of enrollment. Report of non applicable units to the college in August.</td>
</tr>
<tr>
<td>25</td>
<td>Workload Assessment</td>
<td>After this goes into effect, what is the District’s plan to bring enrollment back up?</td>
<td></td>
<td>Mitigate through enrollment management efforts.</td>
</tr>
<tr>
<td>26</td>
<td>Workload Assessment</td>
<td>If it is estimated that 25% of our population is on FA, can the District afford to lose up to 25% of the students?</td>
<td></td>
<td>Mitigate through enrollment management efforts.</td>
</tr>
<tr>
<td>28</td>
<td>Workload Assessment</td>
<td>Can we Go Live w/out the Course Applicability piece? Hold off on course applicability an additional year to test.</td>
<td></td>
<td>The course applicability has been pushed to report only in August 2016 for colleges to take appropriate action and automated award based on course applicability will begin in Spring of 2017.</td>
</tr>
<tr>
<td>34</td>
<td>Workload Assessment</td>
<td>Since this impacts counselors how will we accommodate those students needing to see counselors?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue #</td>
<td>Type</td>
<td>Issue Raised</td>
<td>Date Discussed</td>
<td>Discussion/Consideration</td>
</tr>
<tr>
<td>--------</td>
<td>------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>44</td>
<td>Comm</td>
<td>Messaging campaign idea: create a guide for students to understand next steps and how to better inform FA updates. Identify a staff person who will be directly in charge of messaging these changes to students but bring them into the process.</td>
<td></td>
<td>Assigned to Communications Committee.</td>
</tr>
<tr>
<td>8</td>
<td>Misc</td>
<td>The purchase was not vetted.</td>
<td></td>
<td>Purchase of software was addressed in the Degree Completion and Unit Applicability Report. This report is available online.  <a href="http://www.losrios.edu/student-services/sssp/degree-applicability-2016.pdf">http://www.losrios.edu/student-services/sssp/degree-applicability-2016.pdf</a></td>
</tr>
<tr>
<td>----------------------</td>
<td>------</td>
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<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>Jeffrey Stephenson</td>
<td>ARC</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Marisela Arevalo</td>
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<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Kathleen Otsgard</td>
<td>ARC</td>
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<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Chad Funk</td>
<td>ARC</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Stephanie Smith</td>
<td>ARC</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Parish Geary</td>
<td>ARC</td>
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<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Christine Thomas</td>
<td>CRC</td>
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<td>N</td>
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</tr>
<tr>
<td>Yolanda Garcia</td>
<td>CRC</td>
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<td>Y</td>
<td>Y</td>
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<tr>
<td>Mee Miranda</td>
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<tr>
<td>Phuong Lee</td>
<td>CRC</td>
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<tr>
<td>Richard Andrews</td>
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<td>Y</td>
<td>Y</td>
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<tr>
<td>Gilbert Solorio</td>
<td>DO</td>
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<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Cindy Velas</td>
<td>DO</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Qing Shuler</td>
<td>DO</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Roy Beckhors</td>
<td>DO</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Emma Oesterman</td>
<td>DO</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Ali Pochuk</td>
<td>FLC</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Jonathan Miranda</td>
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<td>N</td>
</tr>
<tr>
<td>Anjie Fuller</td>
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</tr>
<tr>
<td>Christine Hernandez</td>
<td>SCC</td>
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<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Rukia Botes</td>
<td>SCC</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Meisha Daiguier-Acieo</td>
<td>SCC</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Kris Golf</td>
<td>SCC</td>
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<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Rob Heldt</td>
<td>SCC</td>
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<td>N</td>
</tr>
<tr>
<td>Hendrik The</td>
<td>SCC</td>
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<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Joe Rust</td>
<td>Senate</td>
<td>N</td>
<td>N</td>
<td>N</td>
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<tr>
<td>Rafael Rivera</td>
<td>Senate</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Lisa Roberts-Law</td>
<td>Senate</td>
<td>Y</td>
<td>N</td>
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</tr>
<tr>
<td>Lynn Fowler</td>
<td>Senate</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Lee Vlahos-Miguel</td>
<td>Senate</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Jon Alexander</td>
<td>Senate</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Carol Reiner</td>
<td>Senate</td>
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The above is meeting attendance matrix is based on who signed in or were present at the time attendance was taken. It is important to note that the above members are the current FS FS Liaison team members and some have just recently been appointed and the matrix does not include past members. The meeting notes and sign in sheets contain all attendees at the meeting. Several meetings had substitute members and non-team members in attendance.
PS FA Liaison Meeting Notes
April 19, 2016

Attendance: See Attached

Course Applicability:

- IT provided an update: A consulting company will be on site next week to assist with the Degree audit set up. As the IT department gets more accurate data, they will refresh the test environment with production data and run reports the first week of June. Because the refresh data is more current in the test system, the reports should reflect a more accurate projection of the volume of work that should be anticipated when the system goes live.
- Roy provided the clarification on what is expected for August 1 go live with Course Applicability. The report will contain all FA Students who are enrolled in courses that are not applicable to the student’s program of study. Additionally, Roy indicated that the financial aid adjustments would be done automatically. Several colleges indicated that their understanding was that they would have the option of adjusting manually or automate the process. Colleges were asked to talk in their CIT meeting to determine their preference to adjust awards automatically or manually. Roy provided the colleges with the number of students who received Pell Grant in the prior year to have a better understanding of the anticipated work load. Additionally, he provided a sample method for anticipating and projecting workload and resource needs.
- Concerns were raised that that there will not be any faculty or counselors available when the reports are ready for review or when the students need to have aid adjusted.
- There are still concerns about the accuracy of Degree Audit, the reports that will be prepared. SCC recommended that we look at the Degree Audit as a tool for determining Transfer program requirements.
- There was mention for the need to start informing students now about the need to enroll in courses that are applicable to minimize the impact at the beginning of fall. Roy indicated that we can send a message through PeopleSoft to the students who have already competed a FAFSA for the upcoming year. Comments were made that the message should not be a long letter but a brief comment that students would read quickly.
- Legal opinion on the requirements for Transfer program should be coming in the next week.

Issues:

There were no discussion directly related to the issue list.
IT Update: IT indicated that the emails informing students they have messages in eServices would be sent out shortly. They were in the process of building an email server and should have emails going out by week end.

CIT updates:

ARC: Met on the 11th and developing business process for course applicability.
CRC: No Update.
FLC: No Update.
SCC: Counselors discussed DA and the use of ISEP as a tool for determining transfer requirements.

Request for Course Applicability Override demonstration/discussion at next week’s meeting.
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PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
April 19, 2016
1:30 p.m. – 3:00 p.m.

◊ Course Applicability
  • Work group update
  • Issues
    ▪ Workload Measures and Resource Request
    ▪ Policy Issues

◊ IT Update
  • Calendar
  • FA Packaging Training (Refresher for Trainers)
    Tuesday, April 26, 2:00-4:00pm, DO Training Room
  • Initial Packaging and Awarding process May 4th.

◊ Campus Updates

◊ Issues Work in Progress

  • Powerfaids/NetPartner Maintenance Fees
  • Go Live Issues

◊ Security Issues

◊ Recommendations to Project Leadership Committee:

◊ Actions:
  ◊ Next meetings

  • May 3rd 1:30 p.m. – 3:00 p.m. DO MCR
  • May 17th 1:30 p.m. – 3:00 p.m. DO MCR

PS Financial Aid Implementation Liaison Committee Meeting

Notes- 3/29/20165

In attendance: See Attached list

Course Applicability:

1. Work Group Update: Cindy gave an IT update on the course applicability and what the work group findings are so far. See attached.

2. Only ARC has reviewed the issues list and made priorities based on the issues presented. ARC priority issues/concerns:
   a. Accuracy of DA
   b. Transfer programs. All colleges feel this issue is a priority and workload issues are dependent on how this data is captured for course applicability. Roy shared that the initial review by legal is that we cannot allow students to take courses from a cohort of transfer courses and that the transfer courses must align with the students major at the transfer institution. Roy also explained that we were reviewing the possibility of using a transfer certificate that would allow the use of a cohort of students. Both FLC and ARC articulation Officers want to first consider the importing of ASSIST data in the system and feel that the CSUS system is doing it and that this functionality may be a better solution than program changes and design.
   c. Major courses as applied to transfers.
   d. Having a robust messaging system
   e. Transfer credit from another institution.

3. There were concerns about the report functionality that is scheduled for August and what flexibility the colleges have with the August roll out of the report. Roy clarified that if we know students are enrolled in courses that are not applicable and we pay for the courses this would be considered institutional funding and not Federal funding. The report is to provide a level of confidence that we are capturing the right students. Emmie stated that she believed the August report would only be a sample of students and not the entire population. Clarification on what is expected with the August report is needed.

IT Update:

1. Cindy gave an overview of the scheduled for the next two weeks (see attached on agenda).

Issues and work in progress:

1. Roy gave an overview and a handout on what the document review committee is doing.

2. Roy provided the committee copies of the not enrolled, not enrolled in an eligible program and the loan acknowledgement form that was drafted by the communication committee.

3. Train the trainers for Message Center is scheduled for Friday April 1.

Security Update:
1. Emmie informed the colleges that she has the spreadsheet for them to sign and get their 2nd and 3rd level authorization to sign prior to April 1st so we can start loading ISIR data.

2. Security training for managers and those who have an interest in the various modules of PSA is scheduled for March 30th.

3. Spreadsheets can be turned in at the training on March 30th.

4. Cindy informed the committee that the test and development data bases will be refreshed on April 5th and that training in those systems after the refresh will be with generic, all encompassing, security access. The test and development database will not have individual security access until the following refresh (TBD).

No actions for the Project Leadership Team

Next meeting will have limited attendance as most of the financial aid staff will be at a conference.

Campus Updates: None.

Issue and Work in progress:

1. Roy informed the committee of the work that the Document review committee was doing and the need to change the forms to address the new naming conventions related to HP.

2. Marketing: Roy explained that the colleges were working on drafting information to place on Netpartner webpage and send to continuing students. New students would not need additional information as nothing has changed. College asked for a Q&A page to link students to.

3. Colleges were informed of the upcoming HEUG conference and requested their participation. Most colleges have someone slated to go.

Recommendations to Leadership: None
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
March 29, 2016
1:30 p.m. – 3:00 p.m.

◊ Course Applicability
  • Work group update
  • Issues

◊ IT Update:
  • Schedule for upcoming go live
    ▪ 3/24/16  Security setup complete in production
    ▪ 3/30/16  PS FA Overview and Approvers Training
    ▪ 3/31/16  Deadline for campus sign-off of staff security roles
    ▪ 4/1/16    Initial ISIR downloads and processing
    ▪ 4/11/16   eServices: Financial Aid link available to students

◊ Issues Work in Progress
  • Document Review Committee Update
  • Communication Committee
    ▪ Loan Acknowledgement Form
    ▪ Not Enrolled in Eligible Program
    ▪ Not a Student
  • Train the Trainer Message Center (April 1st 10:00-12:00)

◊ Security Issues:
  o Development Refresh (April 5th)

◊ Recommendations to Project Leadership Committee:

◊ Actions:
  Fee Waiver Conflict Verification will be automated

◊ Next meetings
  • March 29th  1:30 p.m. – 3:00 p.m.  DO MCR

- April 5th  1:30 p.m. – 3:00 p.m.  DO MCR (All FA Directors)
- April 19th  1:30 p.m. – 3:00 p.m.  DO MCR
- May 3rd  1:30 p.m. – 3:00 p.m.  DO MCR
- May 17th  1:30 p.m. – 3:00 p.m.  DO MCR
- June 7th  1:30 p.m. – 3:00 p.m.  DO MCR
- Jun 21st  1:30 p.m. – 3:00 p.m.  DO MCR
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PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
March 15, 2016
1:30 p.m. – 3:00 p.m.

◊ Course Applicability
  • Work group update
  • Issues

◊ IT Update:
  • Single College Listed on ISIR
  • Transcript Value “Fine”
  • Campus Staff Training update

◊ Issues Work in Progress
  • Cal Grant B and C program eligibility
  • Fee Waiver Conflict Verification (AGI w/o DRT)
  • Document Review Committee Update

◊ Security Issues:
  o Development Refresh (March 20)

◊ Recommendations to Project Leadership Committee:

◊ Actions:

◊ Next meetings
  • March 29th 1:30 p.m. – 3:00 p.m. DO MCR
  • April 5th 1:30 p.m. – 3:00 p.m. DO MCR (All FA Directors)
  • April 19th 1:30 p.m. – 3:00 p.m. DO MCR
  • May 3rd 1:30 p.m. – 3:00 p.m. DO MCR
  • May 17th 1:30 p.m. – 3:00 p.m. DO MCR
  • June 7th 1:30 p.m. – 3:00 p.m. DO MCR
  • Jun 21st 1:30 p.m. – 3:00 p.m. DO MCR

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In Attendance: See attached list

Course Applicability:

1. In this meeting all that was discussed was the Course Applicability and no other items were discussed.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
March 1, 2016
1:30 p.m. – 3:00 p.m.

◊ Course Applicability Presentation

◊ Issues Work in Progress
  • Campus Staff Training update
  • Cal Grant B and C program eligibility
  • Fee Waiver Conflict Verification (AGI w/o DRT)
  • Document Review Committee Update

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:

◊ Next meeting

  • March 15th 1:30 p.m. – 3:00 p.m. DO MCR
  • March 22nd 1:30 p.m. – 3:00 p.m. DO MCR (Course Audit)
  • March 29th 1:30 p.m. – 3:00 p.m. DO MCR (Course Audit)

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FA Course Applicability
Demonstration
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 3/15/2016

In Attendance: See attached list

Course Applicability:

1. Chris Thomas gave an overview of how the meeting will be structured with the first 30 minutes dedicated to Course applicability and the remainder of the meeting dedicated to the other issues of the implementation project.
2. Joe Carrasco gave an overview of the relationship between Degree Audit (DA) and the course applicability module. See attached diagram.
3. Cindy Velez gave an update on the Workgroup, who is in the group, and they are starting to review the top 10 programs that have exceptions and determining if the exceptions are valid or not. She provided a handout. See attached.
4. AVC Rosario provided a one-page handout on what was shared earlier with the academic senate. The colleges will be provided a report in August instead of automatically adjusting the student’s financial aid awards to afford the colleges the ability to better manage the workload. The automated process will commence in October with the Spring 2017 term.
5. Roy provided the colleges with a comprehensive issues list that is a compilation of all known issues raised. Colleges were asked to take the list to their Campus Implementation Team meeting for a campus discussion on the issues and bring back input at the next meeting. Roy explained that the policy decisions have been vetted through legal and that one policy decision relating to transfer programs is still be interpreted by legal. More information on this will be brought back to the committee.
6. Concerned with the message from the State Chancellors office to open enrollment via online courses to all colleges and the impact these financial aid decisions will have on this issue.
7. The issue of the timing of the catalog as it relates to courses being set up in DA may impact the accuracy of DA. Is the catalog timing based on historical and manual processes and could the release of catalogs be done at a late date. Another comment indicated the catalog needed to be released at the time it is for summer term course selection. Additional comments were made that DA may benefit or could be improved by integrating with Socrates.

IT Updates:

1. The District has completed the beta testing for Oracle on the single college ISIR on the FAFSA and a fix will be release shortly. Work still needs to be done to ensure the CAL ISIR modification can address the single college.
2. Transcript value: The college admissions offices will use the transcript value “evaluated” once they have completed the evaluation of the academic transcript. This will then allow the financial aid award to move forward with a completed SAP.
3. IT did a check in with the colleges on the initial training. All colleges have gone through the initial training except SCC. SCC will have their training this Friday March 18th.
Issues Work in Progress:

1. Cal Grant B and C program eligibility. The District has received the last file from the colleges on which programs are eligible for Cal Grant B and C or both and is in the process of updating the attributes screen on the academic plan table.

2. Fee Waiver Conflict Verification (AGI w/o DRT): ARC, FLC, and CRC agreed that they want the system to identify the conflicting data between the Fee Waive application and the ISIR record and require the student to submit the income and tax transcript to validate the student’s AGI. This will be a recommendation to the Leadership Committee.

3. Document Review committee: Roy gave an update that the committee has the forms on their website and the descriptions are complete. We still need to review Cal ISIR checklist items.

Security Issues:

1. System refresh has moved from March 20th to April 5 so colleges can continue their training in the development database. Colleges will be provided a spreadsheet of the end-user security access to have first and second level authorization signed on the spreadsheet versus having individual security forms signed.

Recommendations to the Leadership Team:

Automate the fee waiver process when there is conflicting information between the AGI in the fee waiver and ISIR record.

Next Meetings:

March 29th 1:30 -3:00 p.m. DO MCR
In Attendance: See attached list

Course Applicability:

1. Christine Hernandez gave an overview and update on the requirement to fund only eligible courses.
2. Joe Carrasco gave an overview and historical account of how IT was requested to find a solution to the requirement to fund only eligible courses. HP was a solution to an issue that had already been scoped. It was build it or buy it.
3. Rafeal Rivera wanted the deadline extended and was concerned that there was not a thorough understanding of the impact this change had on students, counselors and FA staff.
4. Elain Ader wanted to know the impact on instruction and enrollment and if we had plans to mitigate this impact. She indicated the need for work groups to identify impact and help establish processes need for implementing this automation.
5. Several people were concerned about the functionality of DA and stated the system was not designed for this. Many had concerns about how we would handle transfer students and the hundreds of articulation agreements or transfer majors available to students.

No other issues were discussed at this meeting.
PeopleSoft FA Implementation Liaison Committee
FA Course Applicability

Meeting Agenda
February 23, 2016
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ IT Updates
  • Data Review
  • Establish Work Group

◊ Issues/Concerns
  • Review Current Issues List

◊ Recommendations to Project Leadership Committee:

◊ Actions:

◊ Next meeting

  • March 22\textsuperscript{nd} 1:30 p.m. – 3:00 p.m. DO Main Conference Room
  • March 29\textsuperscript{th} 1:30 p.m. – 3:00 p.m. DO Main Conference Room

Document Meeting update
3/24/16

UEH-
1. Steps and reports have been identified and created.
2. Semester end report will be done 3/24/16

FAFSA vs BOG

1. The rules for assigning checklist items for students with the Federal ISIR is complete.
2. The rules for assigning checklist items for students with the CA ISIR will be started today by Gilbert.

Pell LEU

1. Report complete based on UEM and percent of Pell remaining.

Cal Grant Checklist items:

1. The colleges reviewed the Cal ISIR verification sheet presented by CRC and understand that although the form is requesting the same as the Federal ISIR the language in the form is more specific to a CA Dream Act student. The checklist item in PS can be linked to either the current verification worksheet or a verification worksheet that is specific to the Dream Act Students. The members of the committee were asked to get feedback from their college on their preference for the form. They will bring this back next week.

Other Issues discussed:

1. I informed the colleges that we would be loading the Cal Grant Roster and only creating checklist for CADA students who have both a CA ISIR and are on the Cal Grant Roster with the exception of those students who have conflicting information with the fee waiver AGI.
2. IT will work on providing reports for the colleges that identify who on the CG roster is not a active student and those who are a student but are not enrolled in an eligible program. These reports will not be available at go-live. Colleges may use the current Ed goal process in the meantime to facilitate isolating and identifying students not in the system.
3. Maritza asked about messaging training and I indicated that we have the documentation available and training in messaging would occur April 1.
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<tr>
<th>Print Name</th>
<th>College</th>
<th>Dept.</th>
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<tr>
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### Sign In

**PeopleSoft Financial Aid Course Applicability**

2/23/2016

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<td>Elaina Jstar</td>
<td>SCC</td>
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PS Financial Aid Implementation Liaison Committee Meeting

Notes- 2/16/2016

In Attendance: ARC; Kolleen Ostgaard, Joe Rust CRC; Richard Andrews, Yolanda Garcia, Phoung Le, Christine Thomas FLC; Ali Padash, Bernard Gibson SCC; America Rust, Christine Hernandez, Melba Duques-Acacio, Sharon Gilchrist DO; Roy Beckhorn, Cindy Velez, Emmie Oesterman, Joe Carrasco, Betty Glyer-Culver

Check In/Updates:

1. IT Update:
   a. Cindy gave an update on training. Train the trainers took place on February 4th and end user training will be taking place starting this Friday, February 19th. FLC believes the trainers are prepares for the first segment of training but are in need of more training around putting aid on hold and canceling aid. This training will be offered later when it will be closer to the need for training.
   b. Cindy informed the group that we are still waiting on the one ISOR per college fix from Oracle that should be delivered any day now. Los Rios will be a beta tester for the fix.
   c. HEUG Alliance is around the corner and colleges were told about Gilbert and Qing’s session at HEUG on loan packaging and re-packaging.

2. CIT Update:
   a. ARC — will meet on 29th.
   b. CRC- None
   c. FLC – Meeting on Monday
   d. SCC – None

3. Admissions Update: No Update

4. Business Services Update: Rob gave an overview of the Business Services session with the consultant on the disbursement and refund process. He indicated the process is good but his staff may need more familiarization with the student account screen. There was a discussion about having access to the student view screen that provides easier to interpret information. Emmie thought there may be security issues with links. When the staff member is given certain access with links it allows the person the ability to update information on other pages. Emmie will look into this.

Chris Thomas thought the language “refund” may be misleading students to believe that it is like a tax refund and not a FA disbursement. Roy explained the difference between a “refund” and a “disbursement”. The disbursement is the process from FA to the Students Account and Refund is from the student’s account to Accounts Payable or in the case of most of our students, refund to Higher One.
Christine Hernandez stated there was a need for a compilation of the definition of FA terminology.

5. Issues:
   a. **Marketing:** Roy informed the group that a draft notice that will be sent to all faculty and staff informing them of the FA change to PS was on AVC Rosario’s desk for review and then would be shared with the group for input. FLC gave an update on their focus group survey indicating that it was mostly positive. SCC stated their focus group found the eService FA process better than PowerFaid NetPartner. ARC had completed the focus group and survey but was not yet prepared to discuss the result. CRC was not prepared to share results. SCC said in addition to the email, and Net Partner messages, they will be developing material to display at the colleges and centers to inform students. ARC asked if they would share what they are doing.
   
   b. **Course Applicability:** Christine Hernandez opened the conversation with a recommendation that we focus our efforts on Allied Health Program and EOPS students and roll out a pilot program. Roy informed the group that the rollout had been pushed from the April 18th roll out to an August roll out. Roy also informed the group that this delay in rolling out the program would negatively impact students who needed to change courses just before the semester start. Any pilot or delay beyond August would create institutional liabilities and that this would need to be approved by the executive management. It was also requested that we look at the data before determining what action should be taken. IT will provide preliminary data at the meeting scheduled for February 23rd. The colleges were informed to bring staff from other areas to the next meeting that have an interest or concern related to this issue. Roy requested that the additional meetings that have been scheduled be utilized for working through FA Course Applicability issues and DA and that our normal scheduled meetings be used for the other issues related to the implementation project. Chris Thomas asked what was the urgency and Emmie explained the federal governments increased interest in ensuring the integrity of the FA process and Roy stated that informing students that the class they are enrolled may or may not apply to their program of study is a good service and the right thing to do for students.

6. The rest of the agenda items were tabled due to lack of time.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
February 16, 2016
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Marketing
    • Notice to Staff
    • Focus Groups
    • Additional Feedback
  • FA Course Applicability
    • Summary Report- Delay
    • Update on set up
    • Request for work group with A&R, Instruction, FA
  • College Feedback
  • Timeline
  • Cal Grant Program Eligibility
  • Training:
    | Date | Time | Location | Notes                          |
    |------|------|----------|--------------------------------|
    | 2/16 | 1pm-4pm | FLC    | Practice Session (all Trainers welcome) |
    | 2/19/16 | 9am-12pm | FLC    | Staff training: Chapters 1-17   |
    | 2/26/16 | 9am-12pm | CRC    | Staff training: Chapters 1-17   |
    | 3/14/16 | 9am-12pm | ARC    | Staff training: Chapters 1-17   |
    | 3/18/16 | 9am-12pm | SCC    | Staff training: Chapters 1-17   |

◊ Security Issues:
  • Security Roles Update

◊ Recommendations to Project Leadership Committee:

◊ Actions:

PS Financial Aid Implementation Liaison Committee Meeting

Notes- 2/2/2016

In Attendance: ARC; Kolleen Ostgaard, Maricela Arevalo, Chad Funk CRC; Richard Andrews, Yolanda Garcia, Phoung Le, Christine Thomas FLC; Ali Padash, Annie Fuller SCC; Christine Hernandez, Melba Duques-Acacio, Rukiya Bates, Kim Goff DO; Roy Beckhorn, Cindy Velez, Emmie Oesterman, Joe Carrasco

Check In/Updates:

1. IT Update:
   a. Cindy gave an update on FS Consultant being on site and that we successfully tested 100% pass through, 30 percent withholding for IRS, and underage checks to AP.
   b. Cindy gave an update on the progress of the High Point Automation, Course Applicability and Msg center.
   c. Training starts this Thursday with a dry run with the trainers at FLC and followed with end-user training at each of the campuses over the next four Fridays(staring with the 19th.)
   d. Cindy provided an IT issues list to the colleges (see Attached).

2. CIT Update:
   a. ARC – None -meeting was cancelled due to a conflicting meeting regarding the fee waiver implementation.
   b. CRC- None
   c. FLC – discussed the college need to stop a loan from being certified on a case-by-case basis. That based on his staffing levels, he is having a challenge with getting the external award information from other departments into the system prior to the loans being awarded. Action—a meeting with the FA supervisors and staff from EOPS, CARE, and CalWorks will be called to see if business processes can be improved to offset this concern. The two chairs also want to be at this meeting. FLC request a report that list who has been packaged a loan but has not accepted or completed the loan process so they can ensure all external awards are addressed and any adjustment to loan amounts are prioritized.
   d. SCC – None

3. Admissions Update:  No Update
4. Business Services Update:  No-one available to provide an update.
5. Issues:
   a. Go live date: FLC is concerned that due to staffing levels that they will not be ready to go live on April 1, 2016. After discussion, the system will go live to the colleges as scheduled on April 1, 2016 and open to the Students in eservices on April 11, 2016.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
February 2, 2016
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
    ▪ FLC-Loan questions
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Go Live date – tentative April 1, 2016
  • Marketing
  • 2016 HEUG Alliance Conference in Seattle (Mar 6-9)
  • FA Course Applicability – Business process
    ▪ Demo Feb 8th
    ▪ Updating the Academic Advisement Tables
    ▪ Overriding system
  • Higher One Carding process
    ▪ Received ISIR or Received Cal ISIR
    ▪ FA Term is good
    ▪ SAP is good
  • Edconnect - update

◊ Security Issues:
  • Security Roles Update

◊ Recommendations to Project Leadership Committee:

◊ Actions:

PS Financial Aid Implementation Liaison Committee Meeting

Notes- 12/15/2015

In attendance: ARC: none; CRC: Richard Andrews, Yolanda Garcia; FLC: Ali Padash; SCC: Christine Hernandez, Melba Duques-Acia, Kim Goff, Rob Heidt; DO: Gilbert Solorio, Qing Shuler, Roy Beckhorn, Emmie Oesterman

Check in/Updates:

IT:

1. Term and academic plan determination was discussed and clarified.
2. The end user training scheduled was shared.
3. Security for dev would be established by Feb 1, 2016.
4. FA item type descriptions were discussed as well as the difference between disbursement and refund. Rob will follow up with other BSO on the naming convention.
5. High Point purchase was discussed and the committee wanted a presentation on the functionality.

Campus Updates: None.

Issue and Work in progress:

1. Roy informed the committee of the work that the Document review committee was doing and the need to change the forms to address the new naming conventions related to HP.
2. Marketing: Roy explained that the colleges were working on drafting information to place on Netpartner webpage and send to continuing students. New students would not need additional information as nothing has changed. College asked for a Q&A page to link students to.
3. Colleges were informed of the upcoming HEUG conference and requested their participation. Most colleges have someone slated to go.

Recommendations to Leadership: None
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
December 15, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
    ▪ Term Academic Plan determination/process
    ▪ Training Schedule
    ▪ FA Item Type Description Review
    ▪ SF Consultant On-site Jan 25-28
  • Campus Implementation Team Update (Each Campus)
    ▪ ARC- H1 Carding Process
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Document Review Committee
  • Marketing
  • 2016 HEUG Alliance Conference in Seattle (Mar 6-9)

◊ Security Issues:
  • Security Roles Update

◊ Recommendations to Project Leadership Committee:

◊ Actions:


Go-Live January 2016
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
December 15, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◇ Check In/Updates:
  • IT Update
    ▪ Term Academic Plan determination/process
  • Campus Implementation Team Update (Each Campus)
    ▪ ARC- H1 Carding Process
  • Admissions update
  • Business Services updates

◇ Issues & Work in Progress:
  • Course Applicability
  • Cal Grant Familiarization
  • 2016 HEUG Alliance Conference in Seattle (Mar 6-9)

◇ Security Issues:
  • Security Roles Update

◇ Recommendations to Project Leadership Committee:

◇ Actions:


Go-Live January 2016
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 11/17/2015

In Attendance: ARC; Kolleen Ostgaard, Ben Baird, Chad Funk CRC; Richard Andrews, Yolanda Garcia, Phoung Le FLC; Ali Padash SCC; Rukiya Bates, R DO; Roy Beckhorn, Cindy Velez, Emmie Oesterman

Check In/Updates:

1. IT Update:
   a. Cindy gave an update on IT providing the colleges with a task list of issues still outstanding. (See Attached)

2. CIT Update:
   a. ARC – None
   b. CRC- None
   c. FLC – inquired about aligning the process to have Education Levels in Enrollment services are disputed by a student. Ben Baird indicated that these changes to a students application information is done on a case-by-case basis. Financial aid must follow the information that is recorded in Enrollment Services and cannot disburse aid on conflicting information.
   d. SCC – None

3. Admissions Update: No Update
5. Issues:
   a. Course Applicability: Roy gave another overview of the course applicability, message, and Fa automation modifications offered by High Point Consultant and covered the cost of the modifications. Colleges were informed they would need to pay a portion of the cost for the modifications. CRC requested that a demo be provided to counselors and other staff. ARC was concerned that the based on the cost was determined they would pay as much for the modifications as they paid for Powerfaids. Roy explained this functionality was not available in PeopleSoft. Ben Baird wanted to know if this functionality could be used for Veterans. how we of the phased in approach of identifying how and when the process would be implemented.
   b. Cal Grant Familiarization: IT requested feedback on the Cal Grant familiarization process. Roy indicated that Phoung Le had brought up an issue regarding the program eligibility for Cal Grant Types and that IT was working on it and had a possible solution by adding a Cal Grant Eligibility to the Program Plan Attributes panel.
   c. Update on Document/Communication: close to complete for the 16/17 award year.
   d. Security Roles: Emmie gave an update that we are close to finalizing the user roles and that a few minor add-ons were created. Staff will need to compete a security request
form to have user access provided to them. This should be done prior to end user training that will be conducted in January.

6. Recommendations to the Project Leadership Team:

   a. None
PeopleSoft FA Implementation Liaison Committee

Meeting Agenda

November 17, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Course Applicability
  • Cal Grant Familiarization
  • 2016 HEUG Alliance Conference in Seattle (Mar 6-9)

◊ Security Issues:
  • Security Roles Update

◊ Recommendations to Project Leadership Committee:

◊ Actions:


Go-Live January 2016
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 9/15/2015

In Attendance: ARC; Chad Funk, Kolleen Ostgaard, Stephanie Ssmith CRC; Mee Miranda, Richard Andrews, Yolanda Garcia, Phoung Le FLC; Ali Padash SCC; Rukiya Bates, Rob Hiedt, Christine Hernandez DO; Roy Beckhorn, Cindy Velez,

Check In/Updates:

1. IT Update:
   a. Cindy gave an update on IT covering Security, Building Auditability, Financials, Testing dates, General Accounting issues related to disbursing aid. Train the Trainor is coming in October and an overview of the Course applicability.
   b.

2. CIT Update:
   a. ARC – Campus met yesterday and discussed the need for preparing the students for the transition and the campus would like the District to develop videos and brochures for student. They would like a consistent method across the District.
   b. CRC- Met yesterday as well. No issues to discuss.
   c. FLC – No update. Reviewing letters.
   d. SCC – No update.

3. Chad at ARC had concerns about the timing of when incoming transcripts from colleges outside the district will be reviewed and how the timeliness of the review will be communicated to the students. The other colleges did not believe this to be an issue and recommended that Chad talk to Ben about the process.

4. Admissions Update: No Update


6. Issues:
   a. Course Applicability: IT gave another overview of the phased in approach of identifying how and when the process would be implemented.
   b. Program Completion: It will create a non-financial aid eligible program plan that students will be enrolled in once they complete a program of study. This will be shared with the A&R staff and once ready, A&R will enroll students in this program once they have completed a program of study. When the student signs onto eServices the student will be prompted to enroll in another program of study. The system is not currently developed to stop the student from enrolling in the same program. IT will place this on the modification priority list for Enrollment Services. This process will be automated and provide greater communications to the students about the courses they are enrolled in.
   c. Update on Document/Communication: documentation committee has not met. The communication committee has been meeting and reviewing the letters that will be emailed to students. The letters that are completed and those being worked on have been
added to the PSFA Liaison committee meeting for all members to review and provide feedback via their campus communications committee member.

d. **Survey and Update to VPSS:** Roy provided the members will a copy and overview of the survey and a copy of the project status update that was shared with the college VPSS.

e. **System Testing and Training:** Scheduled for October 16, 23, and 30. Additionally, the colleges will need training that is timely to when they will be using PS. The college agreed that eservice financial aid portal should not be opened until after the second big disbursement process in Spring 2016 to minimize confusion for students.

f. **New Fee Waiver Process:** This process will need to be developed in PSFA utilizing the same IT resources as the Implementation project and this may cause confusion for students and staff if not address effectively in staff training and student awareness.

7. **Recommendations to the Project Leadership Team:**

   a. District should develop videos and brochures for students regarding the changes in financial aid.

8. **Actions:**

   a. Chad will check with Ben Baird about the transcript evaluation process and determine what elements need to be in the query for the report to prioritize which transcripts are to be evaluated first. How will students know that the FA process is waiting for transcript evaluation.

   b. IT will create a new non-FA eligible program plan that A&R will enroll students in once they complete a program that requires the student to request a new program once they sign in to eServices.

   c. PSFA Eservice opening date will be after the 2nd large payday in Spring.

9. **Security Issues:** Emmie was not at the meeting, but Roy informed them that the draft roles are being developed to mirror the access needs similar to Powerfaids and once the draft roles are developed, the colleges will test and refine the roles.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
September 15, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
    ▪ Timing of Transcript evaluation (ARC)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Course Catalog Applicability
  • Program Completion
  • Communication Sub Committee /Deadline
  • Survey/Update to VPSS
  • System Testing & Training (16, 23, 30)
  • New Fee Waiver Process

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:


Go-Live January 2016
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
August 18, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Course Catalog Applicability
  • Program Completion
  • FWS
  • Document /Checklist Update/Deadline
  • Communication Sub Committee /Deadline
  • System Testing & Training (Oct 9, 16, 23, 30)

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:


Go-Live January 2016
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 8/18/2015

In Attendance: ARC; Chad Funk, Ben Baird, Kolleen Ostgaard, Stephanie Samth CRC; Mee Miranda, Chris Thomas, Richard Andrews, Yolanda Garcia, Phuong Le FLC; Ali Padash SCC; Sharon Gilchrist, Melba Duques-Acacio, Christine Hernandez DO; Roy Beckhorn, Cindy Velez, Gilbert Solorio, Joe Carrasco

Check In/Updates:

1. IT Update:
   a. Cindy gave an update on IT please see the attached document.
   b. Gilbert gave an update on the ISIR load for the 15/16 year. Please see the attached email. Gilbert also informed the colleges that he needed their Cal ISIR files and Grant rosters or the access to retrieve them.

2. CIT Update:
   a. ARC – Had questions about how transcripts were going to be prioritized to ensure timely awarding and disbursing of aid. IT will provide a report for enrollment services that prioritizes the transcripts that need to be reviewed. Additionally, they wanted to know if the student would be informed on eServices about their SAP status. The system will provide “Meets SAP”, or “Not Meets SAP”, but will not provided student specific data. This information will be provided in a communication to the student.
   b. CRC- No update.
   c. FLC – No update. FLC did have questions about military transcripts, where Enrollment services indicated this is an ongoing discussion in their meeting that also include how they record IB and AP test scores. Enrollment services will keep this committee posted on the outcome of their conversations.
   d. SCC – No update.

3. Admissions Update: No Update.


5. Issues:
   a. Course Applicability: IT shared that they have developed a 2 phase plan to capture this information. Phase I will be completed for go live and phase 2 will require more work to determine the timeline. In Phase 1, the IT will address the easy fixes and provide the colleges with a report of courses that are believed to be outside the program and the colleges will remove the units from the enrollment status. In Phase 2, this process will be automated and provide greater communications to the students about the courses they are enrolled in.
   b. Update on Document/Communication: Mee Gave an update that the document descriptions have been completed. The committee has not met in two weeks due to the workload at the colleges in preparation of the start of the term. Roy informed the
committee that the DOE has just released the information for changes to the verification requirements for the 16/17 award year. The committee will start working on the upcoming year documents. The communication committee has been continuing to review the letters and have completed an estimated 14 letters and have another 15-17 remaining. The colleges are encouraged to review them at the CIT meetings and provide feedback via their communications committee members.

c. **Federal Work Study Request:** Roy followed up with the colleges and isolated the FWS into 4 options (see attached). The colleges weighed in on the options and have recommended option 4 for implementation. This will be taken to the leadership committee for final input.

d. **Training:** IT shared the training dates with the college (see attached agenda). Questions were asked by Emmie on if the training would be provided using the roles access. IT indicated that the Campus trainer would need broader access for the training than what they would need for their campus roles. The end user should be trained with role access.

6. **Recommendations to the Project Leadership Team:** Option 4 for the FWS process.

7. **Actions:**

   a. Colleges will provide Gilbert with CalSIRS and Cal Grant Roster files or access. IT will review the query/report for prioritizing what transcripts need to be evaluated first.

8. **Security Issues:** Emmie will be sharing the draft roles created based on Powerfaids access with the FA supervisors to finalize the roles end users will need at the campus.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
August 18, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates
◊ Issues & Work in Progress:
  • Course Catalog/Applicability
  • Program Completion
  • FWS
  • Document/Checklist Update/Deadline
  • Communication Sub Committee/Deadline
  • System Testing & Training (Oct 9, 16, 23, 30)

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:


Go-Live January 2016
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 7/7/2015

In Attendance: **ARC**; Chad Funk **CRC**; Mee Miranda, Chris Thomas, Richard Andrews **FLC**; Ali Padash **SCC**; Sharon Gilchrist, Rukiya Bates, Christine Hernandez **DO**; Roy Beckhorn, Cindy Velez, Gilbert Solorio, Qing Shuler

Check In/Updates:

1. **IT Update:**
   a. Cindy gave an update on:
      i. Built Run Controls.
      ii. Extra Consultant is assisting with the implementation.
      iii. IT Received college Specific Security model to help separate the FA screens by college.
      iv. IT has been working on the BOG C push.
      v. IT has been working on Special programs field for both current year and for go live with PS.
      vi. System patches will be done by July 11th that will have the system closer to FA production ready. Will Refresh the test system after patches.
      vii. Testing for Disbursements went well.
      viii. Waiting on Financials consultant final report.
      ix. System testing in August.
      x. Charge priorities are done. Two have been identified: 1. Pass through of aid with no deductions and 2, current award year fees owed will be deducted from federal aid (not FWS).
      xi. Qing is still waiting on the list of courses that are not applicable to any FA Eligible program from CRC and SCC.
      xii. Max Time Frame modification should be ready next week. If colleges need a list currently they can contact Qing.

2. **CIT Update:**
   a. ARC – Updated committee on Max Time Frame process, Degree Audit work, moving FA offices starting tomorrow .
   b. CRC- No update.
   c. FLC – No update.
   d. SCC – No update.

3. **Admissions Update:** No Update
4. **Business Services Update:** No update.
5. **Issues:**
   a. **Program completion:** This topic was the main focus of discussion. The committee reviewed the outcome from the college review of Degree Audit and a general thought that
Degree Audit as it currently is set up will require additional functionality to meet the needs of determining the correct FA load or if the program of study is complete or not. The process for developing a system that can correctly determine FA load and degree completion is thought to be a large workload. IT stated we need a cross functional team to flush out the rules before development can occur. What exactly needs to be developed needs to be scoped out to determine if this can be corrected before go live date. If it cannot be corrected before go live date, what is plan B. We currently are working to eliminate courses from the Fa load that are not applicable to any Fa eligible program and we have a process to assist in determining applicable units for Certificate programs but degree and transfer programs are more complex. FLC though we may want to explore looking at the ISEP for applicability. Most thought the ISEP was not a viable option. SCC was concerned that they do not have the resources to have more staff apart of a Cross Functional team and request that District fund two positions for each of the colleges to offset the time spent on the project. ARC is concerned that some students are not permitted to take courses because they are not Counted for the degree when the feds allow a student up to 150% completion rate under SAP. This is a separate regulation from determining the FA Load status.

6. Update on Document/Communication: Roy continues to work with the Document committee. The communication committee has competed the Document Description review, and the descriptions will be paced in the test environment and available for all to comment on. The letters have been edited by the colleges and will now be reviewed by all four college in over the next few weeks. Once final the letters will be available for review and comment by everyone. See attached handouts.

7. Direct Student Loan Request: Roy followed up with the colleges on option 1 from prior meeting. All colleges are in agreement to use option 1 for processing student loans. Option 1 will be forwarded to the PS FA Leadership for final approval. See attached.

8. Training: colleges were provided a training manual for review and comment at the next meeting. Also, it was recommended that District use a train the trainer approach to meet the training needs of the college.

9. Recommendations to the Project Leadership Team: Option 1 for the loan process.

10. Actions:

   a. Roy will bring back an issue requirement outlining the need for FA Loan and Degree Completion.

11. Security Issues:

   a. Chad wanted to see if we can develop a process to identify what staff have received documents and build our role access to allow clerks to receive documents and work files that they did not previously receive documentation for.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
July 7, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Program Completion
    o College Degree Audit findings
  • Document /Checklist Update/Deadline
  • Communication Sub Committee /Deadline
  • Direct Student Loan Request
  • Training

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:
  o Direct Student Loan Request Option 1.

◊ Actions:


Go-Live January 2016
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 6/2/2015

In Attendance: ARC; Chad Funk CRC; Mee Miranda, Chris Thomas, Richard Andrews FLC; none SCC; Sharon Gilchrist, Melba Duques-Azacio, Rob Heidt, Christine Hernandez DO; Roy Beckhorn,

Check In/Updates:

1. IT Update:
   a. Roy gave an update on :
      i. Campus Testing of Disbursement Process. No comments from attendees.
      ii. Student Financial Consultant is on site this week and will be working with the FS team, and General Accounting setting up the process and the General Ledger interface to student Accounts. Conversations regarding if the financial aid funds will be a pass-through in students account are currently being discussed. Colleges are requested to have their BSO supervisors at the meeting this Thursday.
      iii. IT will begin to discuss the setup of the Higher One disbursement file.

2. CIT Update:
   a. ARC – counselors are working on reviewing the Degree Audit data. Several Departments are involved in this process...
   b. CRC- Working on the review of the ten students for degree audit.
   c. FLC – N/A
   d. SCC – No update.

3. Admissions Update: No Update
4. Business Services Update: Cashiering since March is going well.
5. Issues:
   a. Testing and user familiarization: There will be an overview from the PS FS Consultant on Thursday for all FA Supervisors and Business Service Supervisors on the disbursement process for Financial Aid.
   b. Program completion: The colleges were asked about the progress on reviewing the 10 students degree audit and each colleges gave an update (FLC was not present). Roy provided the colleges with a copy of the regulations pertaining to course applicability. ARC is concerned that the rules for course applicability are too stringent. Students who meet the requirements for an area in a degree program should not be authorized to continue to take courses that are not required or necessary for degree.
   c. Roy followed up with the colleges on option 1 from prior meeting. All colleges are in agreement to use option 1 for processing student loans. Option 1 will be forwarded to the PS FA Leadership for final approval. Option 1 requires students to complete their file, complete loan entrance counseling and complete a loan request (on packaging screen in eservices) and then the loan will be packaged. The student will accept, reduce, or decline
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
June 2, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Testing / User Familiarization
    • Disbursements to Student Accounts
  • Program Completion
  • Document /Checklist Update/Deadline
  • Communication Sub Committee /Deadline
  • Direct Student Loan Request

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:

Go-Live January 2016
loan on Eservices. The loan will then be certified, and the student will be required to complete a MPN. MPN will be restricted to students who have a loan certified by the college through COD. See attached.

d. Roy continues to work with the Document committee.

e. The communication committee is currently conducting the second review of the document descriptions and have until June 15 to complete this review process. Once the descriptions are complete, the letters will be sent to the communications group for a second review.

f. The meeting scheduled for June 16th is cancelled. Colleges will be doing their annual FA audits.


7. Recommendations to the Project Leadership Team: Option 1 for the loan process.

8. Actions:

   a. Colleges will review degree audit and review the results to see if we can identify course applicability and/or degree completion.

9. Security Issues:

   a. Emmie will be working with AVC Rosario and the Enrollment team on FERPA requirements and will report back to the FA implementation team.

   b. Edit reports currently used in Powersfaids will be needed in PS to ensure the integrity of the review process.
If a student is enrolled in courses that do not count toward his degree, certificate, or other recognized credential, and they cannot be used to determine enrollment status unless they are eligible remedial courses. This means you cannot award the student aid for classes that do not count toward his degree, certificate, or other recognized credential. Also, federal student aid can be awarded only for learning that results from instruction provided or overseen by the school. It cannot be awarded for any portion of a program based on study or life experience prior to enrollment in the program, or based on tests of learning that are not associated with educational activities overseen by the school.

Full-time student: An enrolled student who is carrying a full-time academic workload, as determined by the institution, under a standard applicable to all students enrolled in a particular educational program. The student's workload may include any combination of courses, work, research, or special studies that the institution considers sufficient to classify the student as a full-time student including for a term-based program, repeating any coursework previously taken in the program but not including either more than one repetition of a previously passed course, or any repetition of a previously passed course due to the student failing other coursework. However, for an undergraduate student, an institution's minimum standard must equal or exceed one of the following minimum requirements:

1. For a program that measures progress in credit hours and uses standard terms (semesters, trimesters, or quarters), 12 semester hours or 12 quarter hours per academic term.

2. For a program that measures progress in credit hours and does not use terms, 24 semester hours or 36 quarter hours over the weeks of instructional time in the academic year, or the prorated equivalent if the program is less than one academic year.

3. For a program that measures progress in credit hours and uses nonstandard terms (terms other than semesters, trimesters or quarters) the number of credits determined by—
   
   (i) Dividing the number of weeks of instructional time in the term by the number of weeks of instructional time in the program's academic year; and

   (ii) Multiplying the fraction determined under paragraph (3)(i) of this definition by the number of credit hours in the program's academic year.

4. For a program that measures progress in clock hours, 24 clock hours per week.

5. A series of courses or seminars that equals 12 semester hours or 12 quarter hours in a maximum of 18 weeks.
(6) The work portion of a cooperative education program in which the amount of work performed is equivalent to the academic workload of a full-time student.

(7) For correspondence coursework, a full-time course load must be—

(i) Commensurate with the full-time definitions listed in paragraphs (1) through (6) of this definition; and

(ii) At least one-half of the coursework must be made up of non-correspondence coursework that meets one-half of the institution's requirement for full-time students.
PS Financial Aid Implementation Liaison Committee Meeting

Notes- 5/26/2015

In Attendance: ARC; Ben Baird, Kolleen Ostgaard CRC; Phoung Le, Chris Thomas FLC; none SCC; Sharon Gilchrist, Melba Duques-Azacio, Rukiyn Bates DO; Roy Beckhorn, Cindy Velez, Qing Shuler, Gilbert Solorio, Emmie Oesterman, Jana pery, Joe Carrasco

Check In/Updates:

1. IT Update:
   a. IT will be working with the Financials consultant next week.
   b. The SR Contractor will be working starting Friday.
   c. FA Testing packaging and Cal Grant Roster Load went well. Still need to test processing.
   d. Joe and Jana discussed the issues of not being able to identify courses specific to student program and how we may be able to use Degree Audit to determine if program is completed. Colleges will provide Jana a list of 10 ids to run degree audit on and the colleges will review the degree audit for course applicability and report back to the group.
   e. Qing is working on FA Term Build and have identified various issues that she is working on a case-by-case basis. Appear to be on the correct path.
   f. Packaging update: went well this Thursday the final session of testing on the external award update and repackaging Pell.

CIT Update:
   g. ARC - No meeting since April 26th.
   h. CRC- None.
   i. FLC - N/A
   j. SCC - No update.

2. Admissions Update: ben gave an update on Transfer credit and that Maryanne Kirkpatrick has started implementing and will visit each college to train and demonstrate how the system works.
3. Business Services Update: None
4. Issues:
   a. Packaging testing went well. All colleges are scheduled for a demonstration for the front line users.
   b. Roy gave an update on the document and communication sub-committee. See attached.
   c. Roy provided three options for the colleges to consider regarding students requesting loans. Most of the colleges like option 1. It was clarified that student must complete both loan entrance counseling, MPN and have the loan originated before it is considered for Post Withdrawal. Students who have a prior loan or have completed loan entrance counseling previously are not required to complete loan entrance counseling each year. It is requested that the recommended be made at the next meeting. See attached.
d. Roy suggested that the colleges meet outside the liaison meeting to discuss when the FWS would be awarded. Mass or individual.

e. The meeting scheduled for June 16th is cancelled. Colleges will be doing their annual audits.

5. Update on Document/Communication: See attached handouts.

6. Recommendations to the Project Leadership Team: None

7. Actions:

   a. Colleges will send Jana a list of students to have degree audit run on, and the colleges will review the results to see if we can identify course applicability.
   b. IT will review the information from South Illinois Communicty College to determine if we can use their set up for course applicability.
   c. Roy will bring the language in the SFA handbook on course applicability to the next meeting to share.

8. Security Issues:

   a. Emmie provided the committee with information from JP regarding FERPA and access to records. See attached.
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<tr>
<th>Print Name</th>
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<tbody>
<tr>
<td>Jay Beckhorn</td>
<td>Beck</td>
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<td>Ruling Baker</td>
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<td>Helen Ostgaard</td>
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<td>Melissa Duvalle-Azario</td>
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<td>Phuong Le</td>
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<td>Christine Thomas</td>
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<td>Qing Shen</td>
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<td>Jana Perry</td>
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<td>Gilbert Solin</td>
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<td>Dr. M.C. Osterman</td>
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PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
May 26, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  - IT Update
  - Campus Implementation Team Update (Each Campus)
  - Admissions update
  - Business Services updates

◊ Issues & Work in Progress:
  - Testing / User Familiarization
    - Cal Grant
    - Disbursements to Student Accounts
  - Program Completion
  - Document /Checklist Update/Deadline
  - Communication Sub Committee /Deadline
  - Direct Student Loan Request
  - Federal Work Study Request
  - Survey

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:
  
  Get data on students to Jane.


Go-Live January 2016
FA Communication Meeting Update

5/26/15

Below is the progress made at each campus:

a. ARC: Initial review of descriptions is 100% complete and ready for second review. Letters are 100% complete and ready for second review.

b. CRC: Initial review of descriptions is 100% complete and ready for second review. Letters are 100% complete and ready for second review.

c. FLC: Initial review of descriptions is 100% complete and ready for second review. Letters are 100% complete and ready for second review.

d. SCC: Initial review of descriptions is 100% complete and ready for second review. Letters are 100% complete and ready for second review.

Deadlines/next Steps:

- Full sub-committee review of Descriptions – June 1st
- Full sub-committee review of Letters – TBA
- Final sub-committee Review - TBD
- CIT review - Ongoing
- Final Document to PSFA Liaison committee by End of July.
PS Financial Aid Implementation Liaison Committee Meeting
Notes- 5/5//2015

In Attendance: ARC; Maritza Lavu, Ben Baird CRC; Mee Miranda, Richard Andrews, Phoung Le, Yolanda Garcia, Chris Thomas FLC; Ali Padash SCC; Rob Heidt, Sharon Gilchrist, Melba Duques-Azacio, Christine Hernandez, Rukiya Bates DO; Roy Beckhorn, Cindy Velez, Qingshuler, Gilbert Solorio, Emmie Oesterman

Check In/Updates:

1. IT Update:
   a. Waiting on Insurance and then the Contractor to assist with project should be on site. Consultant on site this week.
   b. SR coordination is taking place with Mike Day, Jana Perry, Qing Shuler, Jon Arie.
   c. Qing is working on FA Term Build and have identified various issues that she is working on a case-by-case basis. Appear to be on the correct path.
   d. Packaging update: went well this Thursday the final session of testing on the external award update and repackaging Pell.
   e. Roy reminded the colleges to provide the rules for identifying remedial coursework for SAP. Colleges will provide Qing the information.
   f. IT update attached.

2. CIT Update:
   a. ARC – Scheduled for the institutional demonstration. Working with Onbase, working with Qing on Remedial.
   b. CRC- Demonstration this Friday and discussed the descriptions for the documents.
   c. FLC – Have not met, still working on Descriptions and letters.
   d. SCC – Scheduled Demonstration for May 22.
   e. Roy requested that the CIT agenda be forwarded to him to be posted on the Sharepoint to demonstrate the connectivity of the District and College efforts in the project.

3. Admissions Update: Transfer Credit is in production. Questions about Posting degrees.
4. Business Services Update: Cashiering is at a low volume and will wait for peak to determine the capabilities.
5. Issues:
   a. Packaging testing went well. All colleges are scheduled for a demonstration for the front line users.
   b. Deleting comments: Non-issue. The comments are treated the same in PeopleSoft as in Powerfaids.
   c. Roy gave an update on the document and communication sub-committee. See attached.
   d. Roy provided information to start the conversation about students requesting loans. See attached.
   e. Roy started the conversation about FWS and provided some decision points for the CIT to discuss for the next meeting. Chris Thomas would like to consider different amounts for each campus.
f. Program Completion Status: We had a lengthy discussion about how to determine if a student has completed the program if the student has not petitioned for a degree. Concerns were raised about mining for degrees and that we need other people at the discussion to determine the next course of action. Christine Hernandez recommended that the topic be taken to the SR liaison meeting for discussion and then after that we may need to have others at the table. Colleges currently complete the program and re-enroll the student in the same program and we recommended that the student be enrolled in a non-financial aid eligible program “undecided” until the student confirms what program they are continuing in.
g. May 19th meeting is cancelled and will be rescheduled to later in the month.

7. Recommendations to the Project Leadership Team: None

8. Actions:
   
a. Colleges will send Qing the Remedial Rules/ Course IDs for Remedial courses prior to July 1, 2003.
   b. Colleges will forward CIT Agendas for Posting on the SharePoint.
   c. ISIR questions will be answered (see 5c above.).

9. Security Issues:
   a. Emmie provided the committee with information from JP regarding FERPA and access to records. See attached.
PeopleSoft FA Implementation Liaison Committee
Meeting Agenda
May 5, 2015
1:30 p.m. – 3:00 p.m.
District Office Main Conference Room

◊ Check In/Updates:
  • IT Update
  • Campus Implementation Team Update (Each Campus)
  • Admissions update
  • Business Services updates

◊ Issues & Work in Progress:
  • Testing / User Familiarization
    • Packaging Test – April 23, 30 and May 7th
  • Delete Comments
  • Document /Checklist Update/Deadline
  • Communication Sub Committee /Deadline
  • Program Completion Process
  • Direct Student Loans Request
  • Federal Work Study Request
  • May 19th Availability

◊ Security Issues:

◊ Recommendations to Project Leadership Committee:

◊ Actions:

Go-Live January 2016
FA Communication Meeting Update

5/5/15

Below is the progress made at each campus:

a. ARC: Initial review of descriptions is 100% complete and ready for second review. Letters are complete and ready for second review.
b. CRC: Initial review of descriptions and letters are 100% complete and ready for second review by all committee members.
c. FLC: Initial review of descriptions is 100% complete and ready for review by all committee members. Will continue to work on letters
d. SCC: Initial review of descriptions is 100% complete and ready for second review.

Issues:

a. Font- Gilbert will address when putting in html for PS
b. Spacing- Gilbert will address when putting in html for PS
c. Service Hours-colleges should email service hours for their campus.

Deadlines/next Steps:

- Initial Review of Descriptions – 4/25/15-Complete
- Initial Review of Letters – May 1, 2015- Pending
- Full sub committee review-TBD
- Final Sub committee Review - TBD
- CIT review-TBD
- Final Document to PSFA Liaison committee by End of July.
FA Documentation Meeting Update to PS Liaison

5/5/15

1. Review of Forms

   a. XYZ Child Support Paid Independent  Completed
   b. XYZ Child Support Paid dependent  Completed
   c. XYZ Decline of Aid (CRC)  Completed
   d. XYZ Statement of Legal Dependent  Update
   e. XYZ Degree Questionnaire (CRC)  Update
   f. XYZ Dependency Override Form (CRC)  Update
   g. XYZ Dependent Asset Information (SCC)  New
   h. XYZ Independent Asset Information (SCC)  New
   i. XYZ ATB Eligibility Form (SCC)  New
   j. High School Completion Status (ARC)  new
   k. Unusual Enrollment History (CRC)  new
   l. Monitoring Status Form (FLC)  new
   m. Consortium Request (SCC)  new

2. Forms completed on share Point:

3. Web page to host completed documents:
   a. ARC-Complete
   b. SCC – Complete
   c. CRC- complete
   d. FLC-Pending provided link but does not have forms available.

4. Cal ISIR checklist
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: April 6, 2016 – April 19, 2016
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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<tr>
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<th>Current Status</th>
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**Status Notes:**

**Overall Status:**

- Overall project status remains green as significant progress continues to be made on customizations & business process development. However, the milestone schedule status continues to be yellow due to the need to develop a campus business process for FA Course Audit review, as well as the effort to update & validate Degree Audit setup, which is required for the FA Course Audit module implementation.

- Go Live in Progress!
  - ISIR's (Fed & Cal) are being loaded & processed daily.
  - Checklists are being assigned & Messages generated daily.
  - Students have access to their To Do Items and Messages via eServices (Note: Awards will be visible May 4)
  - Packaging & Awarding planned for May 4. FA Consultant, Judith Sternberg, will be on-site the week of May 2 to assist.

- Coordination between the FA and SR analysts is on-going.
  - Current focus is on the update & validation of Degree Audit setup.

- Coordination between the FA and SF analysts is on-going. SF Consultant, Jana Kruckenber, will be on-site the week of May 2 for the next round of testing and validation.

- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.
  - As of Feb, FA Course Applicability discussion is held each meeting.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

**Accomplishments Since Last Report:**

- Project report:
  - Customization development update:
    - List of non-FA eligible courses from colleges
    - Special Programs for Enrollment Identification
    - Expected Grad Term Tracking
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - Direct Loan & Work Study Requests in eServices
    - ISIR Processing (one college per ISIR)
    - Creation of FA Term records only for FA-eligible academic plans
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - Student center FA College selection processes
    - BOG C Push
    - New BOG Fee Waiver Rules starting 16/17 Academic Year

  - ![Done](Done.png)
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- HighPoint Solutions:
  - FA Automation (Checklist Generator) ✓ Done
  - Message Center ✓ Done
  - FA Course Audit (Course Applicability) ▶ In Progress

  o System Testing & Training:
    - FA-SF-GL Interface testing in progress for various refunding scenarios.
    - Packaging Refresher Training for Campus Trainers scheduled 4/26.

  o System Maintenance:
    - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
    - Q2 2016 patches scheduled for production July 16.

  ➢ Work Sessions and Meetings held:
    o PS FA IT Coordination Meeting w/Ciber Weekly on Thursday
    o PS FA Implementation Liaison Committee Meeting April 5, 19
    o New Fee Waiver Process Overview April 19

  ➢ Business process issues discussed with the FA Implementation Liaison Committee March & April:
    o FA Course Applicability

  ➢ Decisions received from Project Leadership Team since last report:
    o None

<table>
<thead>
<tr>
<th>Key Upcoming Activities/Milestones:</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>PS FA Implementation Liaison Committee Meeting (including FA Course Applicability)</td>
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<td>PS FA Project Leadership Team Meeting</td>
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<td>PS FA Staff Training: Packaging Refresher for Trainers</td>
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<tr>
<td>PS FA Packaging &amp; Awarding</td>
<td>5/4</td>
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Project Risks:

➢ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

FA Course Applicability Business Process Due: August 1, 2016

Project Issues:

➢ None this report

Color Key:

- Green: Strong probability item will meet dates and acceptable quality.
- Yellow: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- Red: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
# IT Project Status Report

## Los Rios Community College District

### PeopleSoft Financial Aid Project

**For period:** March 16, 2016 – April 5, 2016

**Submitted by:** Roy Beckhorn, Cindy Velez

**Distribution:** Victoria Rosario, Bryon Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

<table>
<thead>
<tr>
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<td>Milestone Schedule</td>
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### Status Notes:

**Overall Status:**

- Overall project status remains green as significant progress continues to be made on customizations & business process development. However, the milestone schedule status continues to be yellow due to the need to develop a campus business process for FA Course Audit review, as well as the effort to validate Degree Audit setup, which is required for the FA Course Audit module implementation.

- Go Live in Progress!
  
  - Security setup for all FA employees is complete.
  - Customizations are being moved into production.
  - ISIR’s (Fed & Cal) have been loaded & processed.
  - Checklists are currently being assigned.
  - Student access via eServices scheduled for 4/11

- Coordination between the FA and SR analysts is on-going. Current focus is on validation of Degree Audit setup.

- Coordination between the FA and SF analysts is on-going. FA-SF-GL integration and reconciliation business process is being developed and validated.

- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.
  
  - As of Feb, FA Course Applicability discussion is held each meeting.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

### Accomplishments Since Last Report:

- **Project report:**
  
  - Customization development update:
    
    - List of non-FA eligible courses from colleges
    - Special Programs for Enrollment Identification
    - Expected Grad Term Tracking
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - Direct Loan & Work Study Requests in eServices
    - ISIR Processing (one college per ISIR)
    - Creation of FA Term records only for FA-eligible academic plans
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - Student center FA College selection processes
    - BOG C Push
    - HighPoint Solutions:

  - ![Done](image)
  - ![Done](image)
  - ![Done](image)
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  - ![Done](image)
  - ![Done](image)
  - ![Done](image)
  - ![Prod Ready](image)
  - ![Prod Ready](image)
IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

- FA Automation (Checklist Generator)  ✔  Done
- Message Center  ➤  Prod Ready
- FA Course Audit (Course Applicability)  ➤  In Progress

  o System Testing:
    ♦  FA-SF-GL Interface testing in progress for various refunding scenarios.
    ♦  Campus staff (end-user) testing Feb 19-Mar18 (all 4 campuses).

  o System Maintenance:
    ♦  Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
    ♦  Q1 2016 patches scheduled for production March 19.

➤ Work Sessions and Meetings held:
  o PS FA IT Coordination Meeting w/Ciber  Weekly on Thursday
  o PS FA Implementation Liaison Committee Meeting (FA Course Applicability)  March 8, 15, 29
  o PS FA Staff Training Sessions – Message Center  4/1

➤ Business process issues discussed with the FA Implementation Liaison Committee March & April:
  o FA Course Applicability

➤ Decisions received from Project Leadership Team since last report:
  o None

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<thead>
<tr>
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<tr>
<td>PS FA Implementation Liaison Committee Meeting (including FA Course Applicability)</td>
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<td>PS FA IT Project Coordination Meeting w/Ciber</td>
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<tr>
<td>PS FA Staff Training: Packaging Refresher for Trainers</td>
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<tr>
<td>Staff access to PS FA</td>
<td>4/1</td>
</tr>
<tr>
<td>Student access to PS FA in eServices</td>
<td>4/11</td>
</tr>
</tbody>
</table>

Project Risks:

➤ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

New BOG Fee Waiver Rules starting 16/17 Academic Year  Due: April 18, 2016

Project Issues:

➤ None this report

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IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period:  March 2, 2016 – March 15, 2016
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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Status Notes:

**Overall Status:**
- Overall project status remains green as significant progress continues to be made on customizations & business process development. However, the milestone schedule status continues to be yellow due to the need to develop a campus business process for FA Course Audit review, as well as the effort to validate Degree Audit setup, which is required for the FA Course Audit module implementation.
- Campus staff training is scheduled Feb 19 – Mar 18. FLC, CRC and ARC training sessions have been well-received.
- Production security setup for all FA employees is in progress and will be completed by April 1.
- Coordination between the FA and SR analysts is on-going. Current focus is on validation of Degree Audit setup.
- Coordination between the FA and SF analysts is on-going. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.
- Additional PS FA Liaison Committee meetings have been scheduled through April to discuss business process development for FA Course Applicability.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- Project report:
  - Customization development update:
    - List of non-FA eligible courses from colleges
    - Special Programs for Enrollment Identification
    - Expected Grad Term Tracking
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - Direct Loan & Work Study Requests in eServices
    - Student center FA College selection processes
    - BOG C Push
    - ISIR Processing (one college per ISIR)
    - Creation of FA Term records only for FA-eligible academic plans
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - HighPoint Solutions:
      - FA Automation (Checklist Generator)
      - Message Center
      - FA Course Audit (Course Applicability)

  - ✔ Done
  - ✔ Done
  - ✔ Done
  - ✔ Done
  - ✔ Done
  - ✔ Done
  - Prod Ready
  - Prod Ready
  - ✔ System Testing
  - ✔ System Testing
  - ✔ System Testing
  - ✔ System Testing
  - In Progress
  - ✔ System Testing
  - ✔ System Testing
  - ✔ In Progress
IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

- System Testing:
  - FA-SF-GL Interface testing in progress for various refunding scenarios.
  - Campus staff (end-user) testing Feb 19-Mar 18 (all 4 campuses).
- System Maintenance
  - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
  - Q1 2016 patches scheduled for production March 19.

➤ Work Sessions and Meetings held:
  - PS FA IT Coordination Meeting w/Ciber 2/18 & 2/25
  - PS FA Implementation Liaison Committee Meeting (FA Course Applicability) 2/23 & 3/1
  - PS FA Staff Training Sessions – FLC, CRC, ARC 2/19, 2/26, 3/4
  - HEUG Alliance Conference attended by Roy, Cindy, Qing, Gilbert 3/6-9

➤ Business process issues discussed with the FA Implementation Liaison Committee 3/1:
  - FA Course Applicability

➤ Decisions received from Project Leadership Team since last report:
  - Student access to PS FA in eServices on April 11

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<td>PS FA Staff Training Sessions (Friday mornings)</td>
<td>2/19 – 3/18</td>
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<td>Staff access to PS FA</td>
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Project Risks:

➤ Policy & procedure issue resolution: The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

- DOE FAFSA Change: Single College per ISIR
  - Due: April 1, 2016
- CalISIR Update for 16/17 Aid Year
  - Due: April 1, 2016
- New BOG Fee Waiver Rules starting 16/17 Academic Year
  - Due: April 1, 2016

Project Issues:

➤ None this report

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IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: February 17, 2016 – March 1, 2016
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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Status Notes:

**Overall Status:**
- Overall project status remains green as significant progress continues to be made on customizations & business process development. However, the milestone schedule status has changed to yellow due to two developments: 1) the delay in receiving the Oracle solution for the one college per ISIR requirement, and 2) the need to develop a campus business process for FA Course Audit review, as well as the undefined effort to validate Degree Audit setup, which is required for the FA Course Audit module implementation.
- Campus staff training is scheduled Feb 19 – Mar 18. FLC and CRC training sessions have been well-received.
- Coordination between the FA and SR analysts is on-going. Current focus is on validation of Degree Audit setup.
- Coordination between the FA and SF analysts is on-going. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.
- Additional PS FA Liaison Committee meetings have been scheduled through March to discuss business process development for FA Course Applicability.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- Project report:
  - Customization development update:
    - List of non-FA eligible courses from colleges: Done
    - Special Programs for Enrollment Identification: Done
    - Expected Grad Term Tracking: Done
    - College-specific run controls for FA processes: Done
    - College-specific security for FA data: Done
    - Direct Loan & Work Study Requests in eServices: Prod Ready
    - Student center FA College selection processes: Prod Ready
    - BOG C Push: Pending Oracle Update
    - ISIR Processing (one college per ISIR): Pending Oracle Update
    - Creation of FA Term records only for FA-eligible academic plans: System Testing
    - Security Roles & Permission List development: System Testing
    - FA data table auditing: In Progress
    - Lifetime checklist data conversion: In Progress
    - HighPoint Solutions:
      - FA Automation (Checklist Generator): System Testing
      - Message Center: System Testing
      - FA Course Audit (Course Applicability): In Progress
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- System Testing:
  - FA-SF-GL Interface testing in progress for various refunding scenarios.
  - Campus staff (end-user) testing Feb 19-Mar18 (all 4 campuses).
- System Maintenance
  - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
  - Q1 2016 patches scheduled for production March 19.

➤ Work Sessions and Meetings held:
  - PS FA IT Coordination Meeting w/Ciber 2/18 & 2/25
  - PS FA Implementation Liaison Committee Meeting (FA Course Applicability) 2/23 & 3/1
  - PS FA Staff Training Sessions - FLC & CRC 2/19 & 2/26

➤ Business process issues discussed with the FA Implementation Liaison Committee 3/1:
  - FA Course Applicability

➤ Decisions received from Project Leadership Team since last report:
  - Student access to PS FA in eServices on April 11

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<td>PS FA IT Project Coordination Meeting w/Ciber</td>
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<td>PS FA Staff Training Sessions (Friday mornings)</td>
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<td>3/6-9</td>
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Project Risks:

➤ Policy & procedure issue resolution: The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

- DOE FAFSA Change: Single College per ISIR Due: April 1, 2016
- CallSIR Update for 16/17 Aid Year Due: April 1, 2016
- New BOG Fee Waiver Rules starting 16/17 Academic Year Due: April 1, 2016

Project Issues:

➤ None this report

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<th>Description</th>
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<tr>
<td>Green</td>
<td>Strong probability item will meet dates and acceptable quality.</td>
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# IT Project Status Report

**Los Rios Community College District**  
PeopleSoft Financial Aid Project

<table>
<thead>
<tr>
<th>For period:</th>
<th>February 3, 2016 – February 16, 2016</th>
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<tr>
<td>Submitted by:</td>
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</tr>
<tr>
<td>Distribution:</td>
<td>Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco</td>
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## Status Notes:

**Overall Status:**

- Overall project status remains green as significant progress continues to be made on customizations & business process development. However, the milestone schedule status has changed to yellow due to two developments: 1) the delay in receiving the Oracle solution for the one college per ISIR requirement, and 2) the need to develop a campus business process for FA Course Audit review, as well as the undefined effort to clean-up of Degree Audit setup required for the FA Course Audit module implementation.

- HighPoint FA Course Audit demo on Feb 8 raised many business process questions for many campus staff, which are now being addressed.

- Campus staff (end-user) training is scheduled Feb 19 – Mar 18. Practice session on Feb 4 was well-received by those attending.

- Coordination between the FA and SR analysts is on-going. Current focus is on clean-up of Degree Audit setup.

- Coordination between the FA and SF analysts is on-going. FA-SF-GL integration and reconciliation needs are being addressed.

- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

## Accomplishments Since Last Report:

- **Project report:**
  - Customization development update:
    - List of non-FA eligible courses from colleges  - Done
    - Special Programs for Enrollment Identification  - Done
    - Expected Grad Term Tracking  - Done
    - College-specific run controls for FA processes  - Done
    - College-specific security for FA data  - Done
    - Direct Loan & Work Study Requests in eServices  - Done
    - Student center FA College selection processes  - Done
    - BOG C Push  - Pending Oracle Update
    - ISIR Processing (one college per ISIR)  - Pending Oracle Update
    - Creation of FA Term records only for FA-eligible academic plans  - System Testing
    - Security Roles & Permission List development  - System Testing
    - FA data table auditing  - In Progress
    - Lifetime checklist data conversion  - System Testing
    - HighPoint Solutions:
      - FA Automation (Checklist Generator)  - System Testing
      - Message Center  - System Testing
      - FA Course Audit (Course Applicability)  - In Progress
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- System Testing:
  - FA-SF-GL Interface testing in progress for various refunding scenarios.
  - Campus staff (end-user) testing Feb 19-Mar 18 (all 4 campuses).
- System Maintenance
  - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
  - Q1 2016 patches scheduled for production March 19.

- Work Sessions and Meetings held:
  - PS FA IT Coordination Meeting w/Ciber, 2/11 - next meeting 2/25
  - PS FA Staff Training Practice Session, 2/4
  - HighPoint FA Course Audit Demo, 2/8

- Business process issues discussed with the FA Implementation Liaison Committee 2/16:
  - FA Course Audit (Course Applicability) (HighPoint solution)

- Decisions received from Project Leadership Team since last report:
  - Student access to PS FA in eServices on April 11

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Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

- DOE FAFSA Change: Single College per ISIR
  - Due: April 1, 2016
- CallISIR Update for 16/17 Aid Year
  - Due: April 1, 2016
- New BOG Fee Waiver Rules starting 16/17 Academic Year
  - Due: April 1, 2016

Project Issues:

- None this report

Color Key

- **Green**: Strong probability item will meet dates and acceptable quality.
- **Yellow**: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- **Red**: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
# IT Project Status Report
## Los Rios Community College District
### PeopleSoft Financial Aid Project

**For period:** August 5, 2015 – August 18, 2015  
**Submitted by:** Roy Beckhorn, Cindy Velez  
**Distribution:** Victoria Rosario, Bryon Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Melina, Joe Carrasco

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<tr>
<td>Milestone Schedule</td>
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**Status Notes:**

- **Overall Status:**
  - Overall project status remains ‘Yellow’ due to anticipated resource constraints for future project milestones.
  - Significant progress is now being made on customizations, with the help of two contractors.
  - System Testing (IT) planned 8/13 – 10/2.
  - System Testing (Campus) planned 10/9 – 10/30.
  - Bi-weekly coordination meetings between the FA and SR analysts are in progress. Progress of customizations and business process changes are discussed.
  - Coordination between the FA and SF analysts resumed the week of June 1 when the SF consultant was on-site.
  - FA Document Review & FA Communication Review sub-committees meet weekly.
  - Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain yellow unless current risk and schedule mitigation strategies prove inadequate.

**Accomplishments Since Last Report:**

- **Project report:**
  - Configuration tasks continue to run behind schedule due to outstanding business decisions and customizations not yet implemented. Working with IT Management on an on-going basis to augment project resources.  
    *Note:* A PeopleSoft contractor, Jen Arya, joined the IT project team on 5/15. Also, engaging the services of a second consultant for specific customizations, as needed.
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - Lifetime checklist data conversion
    - Special Programs for Enrollment
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Program Completion (FA Progress Units Management)
    - In Progress
    - In Progress
    - In Progress
    - In Progress
    - In Progress
    - In Progress
    - Defining Requirements
  - Student Financials consultant, Jana Kruckenberg, submitted the final report from her June 1 visit.
  - Working with the consultant and the SF team to set up item types for FA disbursement
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
    - Q3 2015 patches scheduled for production October 10.  
  - System Testing:
    - First round (IT) is being planned for mid-August through October 2.
    - Second round (Campus) is planned for October 9, 16, 23, 30.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly on Thursdays
  - PS FA IT Coordination Meeting w/Ciber, 8/13
  - PS FA-Student Records Coordination Team, 8/10
  - PS FA-Student Financials Coordination Team, 6/4
  - FA Data Security & Auditing, 8/17
  - next meeting 8/13
  - next meeting 8/20
  - next meeting 8/24
  - next meeting TBD
  - next meeting 8/24

- Business process issues discussed with the FA Implementation Liaison Committee 8/4:
  - FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
  - Communication Plan (Issue #20) – Roy is actively meeting with this committee.
  - Identification of FA-eligible Courses – Campuses to identify.
  - Program Completions – Cross-functional team needed to develop requirements and business process.
  - Federal Work Study Requests – Campuses discussing options.

- Decisions received from Project Leadership Team since last report:
  - 

<table>
<thead>
<tr>
<th>Key Upcoming Activities/Milestones:</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS FA Implementation Liaison Committee Meeting</td>
<td>8/18</td>
</tr>
<tr>
<td>PS FA Project Leadership Team Meeting</td>
<td>8/19</td>
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<tr>
<td>PS FA IT Project Coordination Meeting w/Ciber</td>
<td>8/20</td>
</tr>
<tr>
<td>PS FA Technology Committee Meeting - FA Document Review Committee</td>
<td>8/20</td>
</tr>
<tr>
<td>Prepare FA test database for first round of system testing</td>
<td>7/27-8/14</td>
</tr>
<tr>
<td>System Testing – First Round</td>
<td>8/17-10/2</td>
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</tbody>
</table>

Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:
  - IT resource availability for project milestones, including customization development and data prep.
  - Note: Factors impacting resource availability include production support requests and new business process development.

Project Issues:

- None this report.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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<tr>
<th>Status Item</th>
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<tbody>
<tr>
<td>Overall Project Status</td>
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</tr>
<tr>
<td>Milestone Schedule</td>
<td>Green</td>
<td>Green</td>
</tr>
</tbody>
</table>

Status Notes:

- **Overall Status:**
  - Overall project status remains green as significant progress continues to be made on customizations & business process development.
  - Campus staff (end-user) training is scheduled Feb 4 – Mar 18.
  - Security roles and permissions have been developed and will be assigned to FA staff in advance of end-user training.
  - Advanced GL Interface testing is still in progress; SF Consultant was on-site last week and assisted with testing and business process development.
  - Coordination meetings between the FA and SR analysts are in progress. Most SR-related customizations and business process changes are completed.
  - Coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
  - Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- **Project report:**
  - Customization development update:
    - List of non-FA eligible courses from colleges: Done
    - Special Programs for Enrollment Identification: Done
    - Expected Grad Term Tracking: Done
    - College-specific run controls for FA processes: Done
    - College-specific security for FA data: Done
    - Direct Loan & Work Study Requests in eServices: Done
    - Student center FA College selection processes: Prod Ready
    - BOG C Push: Prod Ready
    - ISIR Processing (one college per ISIR): Pending Oracle Update
    - Creation of FA Term records only for FA-eligible academic plans: Pending Oracle Update
    - Security Roles & Permission List development: System Testing
    - FA data table auditing: System Testing
    - Lifetime checklist data conversion: In Progress
    - HighPoint Solutions:
      - FA Automation (Checklist Generator): System Testing
      - Message Center: System Testing
      - FA Course Audit (Course Applicability): In Progress
  - **System Testing:**
    - FA-SF-GL Interface testing in progress for 100% Pass Through to Higher One
    - Campus staff (end-user) testing Feb 4-Mar 18 (all 4 campuses).
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- System Maintenance
  - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
  - Q1 2016 patches scheduled for production March 19.

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly
    - FA Document Review Sub-Committee, 1/14 - next meeting TBD
    - FA Communication Review Sub-Committee, 11/5 - next meeting TBD
  - PS FA IT Coordination Meeting w/Ciber, 1/21 - next meeting 2/4
  - PS FA-Student Records Coordination Team, 1/28 - next meeting TBD
  - PS FA-Student Financials Coordination Team, 1/28 - next meeting TBD
  - FA Data Security & Auditing ,1/28 - next meeting TBD

- Business process issues discussed with the FA Implementation Liaison Committee 2/2:
  - FA Course Audit (Course Applicability) (HighPoint solution)

- Decisions received from Project Leadership Team since last report:
  - none

<table>
<thead>
<tr>
<th>Key Upcoming Activities/Milestones:</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>PS FA Implementation Liaison Committee Meeting</td>
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<td>PS FA Project Leadership Team Meeting</td>
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<tr>
<td>PS FA IT Project Coordination Meeting w/Ciber</td>
<td>2/4</td>
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<tr>
<td>HighPoint Demo: FA Course Audit &amp; Message Center</td>
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Project Risks:

- Policy & procedure issue resolution: The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

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<thead>
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<th>Outstanding business decisions/factors identified as potential risks:</th>
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<tr>
<td>DOE FAFSA Change: Single College per ISIR</td>
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<tr>
<td>CallSIR Update for 16/17 Aid Year</td>
<td>April 1, 2016</td>
</tr>
<tr>
<td>New BOG Fee Waiver Rules starting 16/17 Academic Year</td>
<td>April 1, 2016</td>
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</table>

Project Issues:

- None this report

**Color Key**

- Green: Strong probability item will meet dates and acceptable quality.
- Yellow: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- Red: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
# IT Project Status Report

**Los Rios Community College District**  
**PeopleSoft Financial Aid Project**

**For period:** November 18, 2015 – December 15, 2015  
**Submitted by:** Roy Beckhorn, Cindy Velez  
**Distribution:** Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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<thead>
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<tr>
<td>Overall Project Status</td>
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</tr>
<tr>
<td>Milestone Schedule</td>
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<td>[Green]</td>
</tr>
</tbody>
</table>

**Status Notes:**

**Overall Status:**

- Overall project status remains green as significant progress continues to be made on customizations with the part-time assistance of two contractors.
- Campus staff (end-user) training is being planned and will begin in January.
- Security roles and permissions have been developed and will be assigned to FA staff in advance of end-user training.
- Advanced GL Interface testing is now in progress, continuing through the week of Jan 25, when the SF Consultant returns.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are close to being completed.
- Bi-weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

**Accomplishments Since Last Report:**

- **Project report:**
  - Customization development update:
    - List of non-FA eligible courses from colleges: Done
    - Special Programs for Enrollment Identification: Done
    - Expected Grad Term Tracking: Done
    - College-specific run controls for FA processes: Done
    - College-specific security for FA data: Done
    - Student center FA College selection processes: Prod Ready
    - BOG C Push: Prod Ready
    - Creation of FA Term records for only FA-eligible academic plans: System Testing
    - Direct Loan & Work Study Requests in eServices: System Testing
    - Security Roles & Permission List development: In Progress
    - FA data table auditing: In Progress
    - Lifetime checklist data conversion: In Progress
    - Program Completion (FA Progress Units Management): HighPoint solution
  - System Testing:
    - IT and Campus testing successfully completed mid-August through October 30.
    - FA-SF-GL Interface testing in progress for Scenario 1 – Pass Through.
  - System Maintenance
    - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

➤ Work Sessions and Meetings held:
  o PS FA Technology Committee, Weekly
    ▪ FA Document Review Sub-Committee, 12/10 - next meeting 12/17
    ▪ FA Communication Review Sub-Committee, 11/5 - next meeting TBD
  o PS FA IT Coordination Meeting w/Ciber, 12/10 - next meeting 12/17
  o PS FA-Student Records Coordination Team, 12/14 - next meeting TBD
  o PS FA-Student Financials Coordination Team, 11/4 - next meeting TBD
  o FA Data Security & Auditing ,11/23 - next meeting TBD

➤ Business process issues discussed with the FA Implementation Liaison Committee 12/15:
  o Course Applicability (HighPoint solution)

➤ Decisions received from Project Leadership Team since last report:
  o none

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<tr>
<th>Key Upcoming Activities/Milestones</th>
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<tbody>
<tr>
<td>PS FA Implementation Liaison Committee Meeting</td>
<td>12/15</td>
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<tr>
<td>PS FA Project Leadership Team Meeting</td>
<td>12/16</td>
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<tr>
<td>PS FA IT Project Coordination Meeting w/Ciber</td>
<td>12/17</td>
</tr>
<tr>
<td>PS FA Technology Committee Meeting - FA Document Review Committee</td>
<td>12/17</td>
</tr>
<tr>
<td>Student Financials Consultant On-Site for FA-SF-GL Interface Testing</td>
<td>1/25/16</td>
</tr>
</tbody>
</table>

Project Risks:

➤ Policy & procedure issue resolution: The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

DOE FAFSA Change: Single College per ISIR Due: Feb 2016
New BOG Fee Waiver Rules starting 16/17 Academic Year Due: Apr 1, 2016

Project Issues:

➤ None this report
# IT Project Status Report

**Los Rios Community College District**  
**PeopleSoft Financial Aid Project**

<table>
<thead>
<tr>
<th>For period:</th>
<th>November 18, 2015 – December 15, 2015</th>
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<tbody>
<tr>
<td>Submitted by:</td>
<td>Roy Beckhorn, Cindy Velez</td>
</tr>
<tr>
<td>Distribution:</td>
<td>Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco</td>
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<td>Milestone Schedule</td>
<td>Green</td>
<td>Green</td>
</tr>
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**Status Notes:**  
- Overall project status remains green as significant progress continues to be made on customizations with the part-time assistance of two contractors.
- Campus staff (end-user) training is being planned and will begin in January.
- Security roles and permissions have been developed and will be assigned to FA staff in advance of end-user training.
- Advanced GL Interface testing is now in progress, continuing through the week of Jan 25, when the SF Consultant returns.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are close to being completed.
- Bi-weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

## Accomplishments Since Last Report:

- **Project report:**
  - Customization development update:
    - List of non-FA eligible courses from colleges  
    - Special Programs for Enrollment Identification  
    - Expected Grad Term Tracking  
    - College-specific run controls for FA processes  
    - College-specific security for FA data  
    - Student center FA College selection processes  
    - BOG C Push  
    - Creation of FA Term records for only FA-eligible academic plans  
    - Direct Loan & Work Study Requests in eServices  
    - Security Roles & Permission List development  
    - FA data table auditing  
    - Lifetime checklist data conversion  
    - Program Completion (FA Progress Units Management)  
    - Done  
    - Done  
    - Done  
    - Done  
    - Done  
    - Prod Ready  
    - Prod Ready  
    - System Testing  
    - System Testing  
    - In Progress  
    - In Progress  
    - In Progress  
    - HighPoint solution
  - System Testing:
    - IT and Campus testing successfully completed mid-August through October 30.  
    - FA-SF-GL Interface testing in progress for Scenario 1 – Pass Through.
  - System Maintenance:
    - Quarterly patch schedule has been implemented to keep current with FA regulatory changes.  
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly
    - FA Document Review Sub-Committee, 12/10 - next meeting 12/17
    - FA Communication Review Sub-Committee, 11/5 - next meeting TBD
  - PS FA IT Coordination Meeting w/Ciber, 12/10 - next meeting 12/17
  - PS FA-Student Records Coordination Team, 12/14 - next meeting TBD
  - PS FA-Student Financials Coordination Team, 11/4 - next meeting TBD
  - FA Data Security & Auditing, 11/23 - next meeting TBD

- Business process issues discussed with the FA Implementation Liaison Committee 12/15:
  - Course Applicability (HighPoint solution)

- Decisions received from Project Leadership Team since last report:
  - none

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</tr>
<tr>
<td>Student Financials Consultant On-Site for FA-SF-GL Interface Testing</td>
<td>1/25/16</td>
</tr>
</tbody>
</table>

Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:
- DOE FAFSA Change: Single College per ISIR
  Due: Feb 2016
- New BOG Fee Waiver Rules starting 16/17 Academic Year
  Due: Apr 1, 2016

Project Issues:

- None this report

Color Key

- [Green] Strong probability item will meet dates and acceptable quality.
- [Yellow] Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- [Red] Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: November 4, 2015 – November 17, 2015
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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</table>

Status Notes:

**Overall Status:**
- Overall project status remains green as significant progress continues to be made on customizations with the part-time assistance of two contractors.
- Campus Cal Grant work session held 11/20.
- Campus staff (end-user) training is being planned and will begin in January.
- Security roles and permissions have been developed and are being refined in advance of end-user training.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are being tracked.
- Bi-weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

> Project report:
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges: ✓ Done
    - Special Programs for Enrollment
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Direct Loan & WorkStudy Requests in eServices
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - Expected Grad Term Tracking
    - Program Completion (FA Progress Units Management)
  - System Testing:
    - IT and Campus testing successfully completed mid-August through October 30.
    - FA-SF-GL Interface testing planned Dec-Jan.
  - System Maintenance
    - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

➢ Work Sessions and Meetings held:
  o PS FA Technology Committee, Weekly
    ▪ FA Document Review Sub-Committee, 11/12 - next meeting 11/20
    ▪ FA Communication Review Sub-Committee, 11/5 - next meeting TBD
  o PS FA IT Coordination Meeting w/Ciber, 11/12 - next meeting 11/19
  o PS FA-Student Records Coordination Team, 11/13 - next meeting 12/3
  o PS FA-Student Financials Coordination Team, 11/4 - next meeting TBD
  o FA Data Security & Auditing, 11/10 - next meeting 11/23

➢ Business process issues discussed with the FA Implementation Liaison Committee 11/17:
  o Course Applicability (HighPoint solution)

➢ Decisions received from Project Leadership Team since last report:
  o none

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Project Risks:

➢ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

DOE FAFSA Change: Single College per ISIR Due: Jan 1, 2016
New BOG Fee Waiver Rules starting 16/17 Academic Year Due: Mar 15, 2016

Project Issues:

➢ None this report

Color Key
- Green: Strong probability item will meet dates and acceptable quality.
- Yellow: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- Red: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
# IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

For period: October 21, 2015 – November 3, 2015

Submitted by: Roy Beckhorn, Cindy Velez

Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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**Status Notes:**

**Overall Status:**
- Overall project status remains green as significant progress continues to be made on customizations with the part-time assistance of two contractors.
- Campus Train-the-Trainer Training & System Testing successfully completed.
- Campus staff (end-user) training is being planned and will begin in January.
- Security roles and permissions have been developed are being refined in advance of end-user training.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are being tracked.
- Bi-weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

**Accomplishments Since Last Report:**

- **Project report:**
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Special Programs for Enrollment
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Direct Loan & WorkStudy Requests in eServices
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - Program Completion (FA Progress Units Management)
  - **System Testing:**
    - First round (IT) - successfully completed mid-August through October 14.
    - Second round (Campus) - successfully completed October 15, 22, 29.
  - **System Maintenance**
    - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly
    - FA Document Review Sub-Committee, 10/1 - next meeting 11/12
    - FA Communication Review Sub-Committee, 10/23 - next meeting 11/5
  - PS FA IT Coordination Meeting w/Ciber, 10/23 - next meeting 11/5
  - PS FA-Student Records Coordination Team, 11/2 - next meeting 11/16
  - PS FA-Student Financials Coordination Team, 10/13 - next meeting 11/4
  - FA Data Security & Auditing, 10/14 - next meeting 11/4

- Business process issues discussed with the FA Implementation Liaison Committee 11/4:
  - User Familiarization & End-User Training – Starting January

- Decisions received from Project Leadership Team since last report:
  - none

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<td>PS FA Project Leadership Team Meeting</td>
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<td>FA-SF-GL Integration Planning Meeting</td>
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<tr>
<td>PS FA IT Project Coordination Meeting w/Ciber</td>
<td>11/5</td>
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<td>PS FA Technology Committee Meeting - FA Communication Review Committee</td>
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<td>11/5</td>
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<td>- FA Document Review Committee</td>
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<tr>
<td>User Familiarization Session: Cal Grant Processing</td>
<td>11/19</td>
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Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

- DOE FAFSA Change: Single College per ISIR
  - Due: Jan 1, 2016
- New BOG Fee Waiver Rules starting 16/17 Academic Year
  - Due: Mar 15, 2016

Project Issues:

- None this report

Color Key:

- Green: Strong probability item will meet dates and acceptable quality.
- Yellow: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- Red: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
## IT Project Status Report

Los Rios Community College District  
PeopleSoft Financial Aid Project

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<th>For period:</th>
<th>September 16, 2015 – October 20, 2015</th>
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<td>Submitted by:</td>
<td>Roy Beckhorn, Cindy Velez</td>
</tr>
<tr>
<td>Distribution:</td>
<td>Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco</td>
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<tbody>
<tr>
<td>Overall Project Status</td>
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<td>![Green]</td>
</tr>
<tr>
<td>Milestone Schedule</td>
<td>![Green]</td>
<td>![Green]</td>
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</tbody>
</table>

### Status Notes:

- **Overall Status:**
  - Overall project status remains green as significant progress continues to be made on customizations with the part-time assistance of two contractors.
  - FA consultant, Judith Stemberg, and SF consultant, Jana Kruckenberg, were onsite the week of Sept. 28 to assist with IT System Testing.
  - Campus Train-the-Trainer Training and System Testing sessions have started (dates: 10/15, 10/22 and 10/29).
  - Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are being tracked.
  - Bi-weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
  - Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

*Overall Status will remain green unless current risk and schedule mitigation strategies prove inadequate.*

### Accomplishments Since Last Report:

- **Project report:**
  - Configuration tasks are now on schedule as a result of resource augmentation over the past several months.  
    (Note: Two part-time contractors are now assisting with the FA customizations.)
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Special Programs for Enrollment
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Direct Loan & WorkStudy Requests in eServices
    - Security Roles & Permission List development
    - FA data table auditing
    - Lifetime checklist data conversion
    - Program Completion (FA Progress Units Management)  
      - Done
      - Done
      - System Testing
      - System Testing
      - System Testing
      - System Testing
      - System Testing
      - System Testing
      - In Progress
      - In Progress
      - In Progress
      - In Progress
      - Specification Development
  - **System Testing:**
    - First round (IT) was successfully completed mid-August through October 14.
    - Second round (Campus) is in progress now (October 15, 22, 29).
  - **Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes:**
    - Q3 2015 patches scheduled for production October 10.  
      - Done
## IT Project Status Report

**Los Rios Community College District**  
**PeopleSoft Financial Aid Project**

### Work Sessions and Meetings held:
- **PS FA Technology Committee, Weekly**
  - FA Document Review Sub-Committee, 10/1 - next meeting TBD
  - FA Communication Review Sub-Committee, 10/16 - next meeting 10/23
- **PS FA IT Coordination Meeting w/Ciber, 10/16** - next meeting 10/23
- **PS FA-Student Records Coordination Team, 10/19** - next meeting 11/2
- **PS FA-Student Financials Coordination Team, 10/13** - next meeting 11/4
- **PS FA Data Security & Auditing, 10/14** - next meeting TBD

### Business process issues discussed with the FA Implementation Liaison Committee 9/16:
- FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
- Communication Plan (Issue #20) – Roy is actively meeting with this committee.
- Program Completions – Phased implementation planned; requires cross-functional team to implement.

### Decisions received from Project Leadership Team since last report:
- none

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<td>PS FA IT Project Coordination Meeting w/Ciber</td>
<td>10/22</td>
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<td>PS FA Technology Committee Meeting - <strong>FA Communication Review Committee</strong></td>
<td>10/23</td>
</tr>
<tr>
<td>Campus Train-the-Trainer Training and System Testing</td>
<td>10/15, 10/22, 10/29</td>
</tr>
</tbody>
</table>

### Project Risks:

#### Policy & procedure issue resolution:
The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

### Outstanding business decisions/factors identified as potential risks:
- New Prod Support Project: Full Time Student Success Grant  
  Due: Oct 1, 2015 ✓ Done
- New BOG Fee Waiver Rules starting 16/17 Academic Year  
  Due: Mar 15, 2016

### Project Issues:
- None this report

---

**Color Key**

- **Green** Strong probability item will meet dates and acceptable quality.
- **Yellow** Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- **Red** Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: August 19, 2015 – September 15, 2015
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Melanie Dixon, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

Status Notes:

Overall Status:
- Overall project status has returned to green as a result of the additional resources added to the project in the past 3 months.
- Significant progress is now being made on customizations, with the help of two contractors.
- FA consultant, Judith Sternberg, and SF consultant, Jana Kruckenberg, will both be onsite the week of Sept. 28 to assist with IT System Testing.
- Campus Train-the-Trainer Training and System Testing planned 10/15, 10/22 and 10/29.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are being tracked.
- Weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

Overall Status will remain green unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- Project report:
  o Configuration tasks are now on schedule as a result of resource augmentation over the past three months. (Note: Two part-time contractors are now assisting with the FA customizations.)
  o Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Special Programs for Enrollment
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Lifetime checklist data conversion
    - Security FA data by college
    - Security Roles & Permission List development
    - FA data table auditing
    - Program Completion (FA Progress Units Management)
  ✓ Done
  ✓ Done
  ➤ System Testing
  ➤ System Testing
  ➤ System Testing
  ➤ System Testing
  ➤ System Testing
  ➤ In Progress
  ➤ In Progress
  ➤ In Progress
  ➤ In Progress
  ♦ Specification Development

- System Testing:
  - First round (IT) is being planned for mid-August through October 14.
  - Second round (Campus) is planned for October 15, 22, 29.

- Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
  - Q3 2015 patches scheduled for production October 10. ➤ In Progress
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

➤ Work Sessions and Meetings held:
  o PS FA Technology Committee, Weekly on Thursdays
    ▪ FA Document Review Sub-Committee, 8/13 - next meeting 9/17
   o PS FA IT Coordination Meeting w/Ciber, 9/3 - next meeting 9/18
   o PS FA-Student Records Coordination Team, 9/9 - next meeting 9/21
   o PS FA-Student Financials Coordination Team, 9/11 - next meeting TBD
   o FA Data Security & Auditing, 8/24 - next meeting 9/18

➤ Business process issues discussed with the FA Implementation Liaison Committee 8/4:
  o FA Document Standardization (Issue #3) - Roy is actively meeting with this committee.
  o Communication Plan (Issue #20) - Roy is actively meeting with this committee.
  o Program Completions - Cross-functional team needed to develop requirements and business process.
  o Federal Work Study Requests - Campuses discussing options.

➤ Decisions received from Project Leadership Team since last report:
  o none

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<td>System Testing – First Round</td>
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</table>

Project Risks:

➤ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

New Prod Support Project: Full Time Student Success Grant Due: Oct 1, 2015
New BOG Fee Waiver Rules starting 16/17 Academic Year Due: Mar 15, 2016

Project Issues:

➤ None this report

<table>
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<th>Color Key</th>
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<tbody>
<tr>
<td>Green</td>
</tr>
<tr>
<td>Yellow</td>
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<tr>
<td>Red</td>
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# IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

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<tr>
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**Status Notes:**

- **Overall Status:**
  - Overall project status has returned to green as a result of the additional resources added to the project in the past 3 months.
  - Significant progress is now being made on customizations, with the help of two contractors.
  - FA consultant, Judith Stemberg, and SF consultant, Jana Kruckenber, will both be onsite the week of Sept. 28 to assist with IT System Testing.
  - Campus Train-the-Trainer Training and System Testing planned 10/15, 10/22 and 10/29.
  - Bi-weekly coordination meetings between the FA and SR analysts are in progress. SR-related customizations and business process changes are being tracked.
  - Weekly coordination meetings between the FA and SF analysts are in progress. FA-SF-GL integration and reconciliation needs are being addressed.
  - Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain green unless current risk and schedule mitigation strategies prove inadequate.

---

**Accomplishments Since Last Report:**

- **Project report:**
  - Configuration tasks are now on schedule as a result of resource augmentation over the past three months. (Note: Two part-time contractors are now assisting with the FA customizations.)
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Special Programs for Enrollment
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    - College-specific run controls for FA processes
    - College-specific security for FA data
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Lifetime checklist data conversion
    - Security FA data by college
    - Security Roles & Permission List development
    - FA data table auditing
    - Program Completion (FA Progress Units Management)
  - System Testing:
    - First round (IT) is being planned for mid-August through October 14.
    - Second round (Campus) is planned for October 15, 22, 29.
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
    - Q3 2015 patches scheduled for production October 10. **In Progress**

---

Page: 1
IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

➤ Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly on Thursdays - next meeting 9/17
  - FA Document Review Sub-Committee, 8/13
  - PS FA IT Coordination Meeting w/Cibber, 9/3 - next meeting 9/18
  - PS FA-Student Records Coordination Team, 9/9 - next meeting 9/21
  - PS FA-Student Financials Coordination Team, 9/11 - next meeting TBD
  - FA Data Security & Auditing, 8/24 - next meeting 9/18

➤ Business process issues discussed with the FA Implementation Liaison Committee 8/4:
  - FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
  - Communication Plan (Issue #20) – Roy is actively meeting with this committee.
  - Program Completions – Cross-functional team needed to develop requirements and business process.
  - Federal Work Study Requests – Campuses discussing options.

➤ Decisions received from Project Leadership Team since last report:
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Project Risks:

➤ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

New Prod Support Project: Full Time Student Success Grant Due: Oct 1, 2015
New BOG Fee Waiver Rules starting 16/17 Academic Year Due: Mar 15, 2016

Project Issues:

➤ None this report

Color Key

- Green: Strong probability item will meet dates and acceptable quality.
- Yellow: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- Red: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: August 5, 2015 – August 18, 2015

Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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</tr>
<tr>
<td>Milestone Schedule</td>
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Status Notes:

**Overall Status:**

- Overall project status remains ‘Yellow’ due to anticipated resource constraints for future project milestones.
- Significant progress is now being made on customizations, with the help of two contractors.
- System Testing (IT) planned 8/13 – 10/2.
- System Testing (Campus) planned 10/9 – 10/30.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. Progress of customizations and business process changes are discussed.
- Coordination between the FA and SF analysts resumed the week of June 1 when the SF consultant was on-site.
- FA Document Review & FA Communication Review sub-committees meet weekly.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain yellow unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- Project report:
  - Configuration tasks continue to run behind schedule due to outstanding business decisions and customizations not yet implemented. Working with IT Management on an on-going basis to augment project resources.
  - A PeopleSoft contractor, Jen Arya, joined the IT project team on 5/15. Also, engaging the services of a second consultant for specific customizations, as needed.
  - Customization development update:
    - Soliciting Non FA eligible courses list from the colleges
    - Student center FA College selection processes
    - College-specific run controls for FA processes
    - College-specific security for FA data
    - Lifetime checklist data conversion
    - Special Programs for Enrollment
    - BOG C Push
    - Creating FA Term records for FA-eligible academic plans, only.
    - Program Completion (FA Progress Units Management)
  - Student Financials consultant, Jana Kruckenberg, submitted the final report from her June 1 visit.
    - Working with the consultant and the SF team to set up item types for FA disbursement
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
    - Q3 2015 patches scheduled for production October 10.
  - System Testing:
    - First round (IT) is being planned for mid-August through October 2.
    - Second round (Campus) is planned for October 9, 16, 23, 30.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly on Thursdays
  - PS Document Review Sub-Committee, 7/16 - next meeting 8/13
  - PS FA IT Coordination Meeting w/Ciber, 8/13 - next meeting 8/20
  - PS FA-Student Records Coordination Team, 8/10 - next meeting 8/24
  - PS FA-Student Financials Coordination Team, 8/4 - next meeting TBD
  - FA Data Security & Auditing, 8/17 - next meeting 8/24

- Business process issues discussed with the FA Implementation Liaison Committee 8/4:
  - FA Document Standardization (Issue #3) - Roy is actively meeting with this committee.
  - Communication Plan (Issue #20) - Roy is actively meeting with this committee.
  - Identification of FA-eligible Courses - Campuses to identify.
  - Program Completions - Cross-functional team needed to develop requirements and business process.
  - Federal Work Study Requests - Campuses discussing options.

- Decisions received from Project Leadership Team since last report:
  -

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<tr>
<td>PS FA Technology Committee Meeting - FA Document Review Committee</td>
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<tr>
<td>Prepare FA test database for first round of system testing</td>
<td>7/27-8/14</td>
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<tr>
<td>System Testing - First Round</td>
<td>8/17-10/2</td>
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Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

- Outstanding business decisions/factors identified as potential risks:
  - IT resource availability for project milestones, including customization development and data prep.
  - Note: Factors impacting resource availability include production support requests and new business process development.

Project Issues:

- None this report.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: May 27, 2015 – July 7, 2015
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryon Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

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<td>Milestone Schedule</td>
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</table>

Status Notes:

**Overall Status:**
- Overall project status remains 'Yellow' due to anticipated resource constraints for future project milestones.
- Significant progress is now being made on customizations, with the help of two contractors.
- Campus unit testing of FA Disbursements to Student Accounts was successfully completed 5/28.
- Bi-weekly coordination meetings between the FA and SR analysts are in progress. Progress of customizations and business process changes are discussed.
- Coordination between the FA and SF analysts resumed the week of June 1 when the SF consultant was on-site.
- FA Document Review & FA Communication Review sub-committees meet weekly.
- Bi-monthly meetings with the PS FA Liaison Committee are being held to discuss business process decisions that must be made in order to advance the project.

**Overall Status** will remain yellow unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- **Project report:**
  - Configuration tasks continue to run behind schedule due to outstanding business decisions and customizations not yet implemented. Working with IT Management on an on-going basis to augment project resources. *Note: A PeopleSoft contractor, Jen Arya, joined the IT project team on 5/15. Also, engaging the services of a second consultant for specific customizations, as needed.*
  - Customization development update:
    - Determining FA College – Phase I  Complete
    - Cal Grant Processing – Phase I (Roster) Complete
    - Transcript Tracking for FA Students Complete
    - College-specific run controls for FA processes In Progress
    - College-specific security for FA data In Progress
    - Special Programs for Enrollment In Progress
    - BOG C Push In Progress
    - Creating FA Term records for FA-eligible academic plans, only. In Progress
    - *Note: Additional development work is needed to accommodate Los Rios’ multi-college configuration.*
  - Student Financials consultant, Jana Kruckenberg, was on-site the week of June 1 to assist with the integration of the Financial Aid, Student Financials and General Ledger modules. *Awaiting final report from her visit.*
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
    - Q1 & Q2 2015 patches scheduled for July 11.
    - Refresh of test database to occur the week of July 13, in preparation of first round of system testing.
  - Campus unit testing update:
    - FA Disbursements to Student Accounts testing was conducted May 28.
    - First round of system testing is being planned for mid-August through mid-September.
IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

➢ Work Sessions and Meetings held:
  o PS FA Technology Committee, Weekly on Thursdays
    • FA Document Review Sub-Committee, 7/7
  o PS FA IT Coordination Meeting w/Ciber, 7/7
  o PS FA-Student Records Coordination Team, 6/30
  o PS FA-Student Financials Coordination Team, 6/4
  o FA Data Security & Auditing, 4/28

➢ Business process issues discussed with the FA Implementation Liaison Committee 5/26:
  o FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
  o Communication Plan (Issue #20) – Roy is actively meeting with this committee.
  o Identification of FA-eligible Courses – Campuses to identify.
  o Program Completions – Cross-functional team needed to develop requirements and business process.
  o Direct Student Loan Requests (Issue #26) – Option 1 recommended.
  o Federal Work Study Requests – Campuses discussing options.

➢ Decisions received from Project Leadership Team since last report:
  o None

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Project Risks:

➢ Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

Outstanding business decisions/factors identified as potential risks:

➢ IT resource availability for project milestones, including customization development and data prep.
  Note: Factors impacting resource availability include production support requests and new business process development.

Project Issues:

➢ None this report.
IT Project Status Report
Los Rios Community College District
PeopleSoft Financial Aid Project

For period: May 6, 2015 – May 26, 2015
Submitted by: Roy Beckhorn, Cindy Velez
Distribution: Victoria Rosario, Bryan Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

Status Item | Current Status | Prior Status
---|---|---
Overall Project Status | Yellow | Yellow
Milestone Schedule | Green | Green

Status Notes:
- Overall Status:
  - Overall project status remains ‘Yellow’ due to anticipated resource constraints for future project milestones.
  - An additional IT resource (outside contractor) has joined the project team as of 5/15.
  - Campus unit testing of FA Packaging and Cal Grant Roster Processing was completed 5/7 and 5/21, respectively. Testing of FA Disbursements to Student Accounts scheduled 5/28.
  - Coordination between the FA and SR analysts is in progress. Met 5/5 to finalize task list for the IT contractor.
  - Coordination between the FA and SF analysts has resumed. Met 5/4 to coordinate the on-site visit of the SF consultant the week of June 1.
  - FA Document Review & FA Communication Review sub-committees meet weekly.
  - Continuing regular discussions with the PS FA Liaison Committee on business process decisions that must be made in order to advance the project.

Overall Status will remain yellow unless current risk and schedule mitigation strategies prove inadequate.

Accomplishments Since Last Report:

- Project report:
  - Configuration tasks continue to run behind schedule due to outstanding business decisions and customizations not yet implemented. Working with IT Management to augment project resources. Note: A PeopleSoft contractor, Jen Aoya, joined the IT project team on 5/15.
  - Customization development update:
    - Determining FA College – Phase I is complete and tested.
    - Creating FA Term records for FA-eligible academic plans, only. Note: Additional development work is needed to accommodate Los Rios’ multi-college configuration.
    - Cal Grant Processing – Phase I (Roster) is complete and tested.
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
    - Q1 & Q2 2015 patches scheduled for July 11.
  - Campus unit testing update:
    - Packaging process testing was conducted April 23 & 30 and May 7.
    - Cal Grant Roster Processing testing was conducted May 21.
    - FA Disbursements to Student Accounts testing to be conducted May 28.
  - A Student Financials consultant, Jana Kruckenber, will be on-site the week of June 1 to assist with the integration of the Financial Aid, Student Financials and General Ledger modules.

- Work Sessions and Meetings held:
  - PS FA Technology Committee, Weekly on Thursdays
    - FA Document Review Sub-Committee, 5/7, 5/14, 5/21- next meeting 5/28
  - PS FA IT Coordination Meeting w/Ciber, 5/7, 5/14, 5/21 - next meeting 6/4
  - PS FA-Student Records Coordination Team, 5/4 - next meeting TBD
IT Project Status Report

Los Rios Community College District
PeopleSoft Financial Aid Project

- PS FA-Student Financials Coordination Team, 5/5 - next meeting 6/1
- FA Data Security & Auditing, 4/28 - next meeting TBD

- Business process issues discussed with the FA Implementation Liaison Committee 5/26:
  - FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
  - Communication Plan (Issue #20) – Roy is actively meeting with this committee.
  - Identification of Remedial Courses – Campuses to identify remedial courses prior to 2003.
  - Program Completions – Business process changes required.
  - Direct Student Loan Requests (Issue #26) – Campuses to discuss options.
  - Federal Work Study Requests – Campuses to discuss options.

- Decisions received from Project Leadership Team since last report:
  - None

<table>
<thead>
<tr>
<th>Key Upcoming Activities/Milestones</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS FA Implementation Liaison Committee Meeting</td>
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<td>5/28</td>
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<tr>
<td>Functional testing of FA Disbursements to Student Accounts</td>
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<td>Student Financials Consultant On-site</td>
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</table>

Project Risks:

- Policy & procedure issue resolution: The project timeline assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

  Outstanding business decisions/factors identified as potential risks:
  - IT resource availability for project milestones, including customization development and data prep.

Project Issues:

- None this report.
# IT Project Status Report

## Los Rios Community College District
PeopleSoft Financial Aid Project

**For period:** April 22, 2015 – May 5, 2015  
**Submitted by:** Roy Beckhorn, Cindy Velez  
**Distribution:** Victoria Rosario, Bryan Bell, Christine Hernandez, Kolleen Ostgaard, Christine Thomas, Doug Meline, Joe Carrasco

### Status Notes:
- **Overall Status:**
  - Overall project status remains 'Yellow' due to anticipated resource constraints for future project milestones.
  - An additional IT resource (outside contractor) has been identified and is ready to begin working. Waiting for final contract paperwork to be approved.
  - Campus unit testing of FA Packaging is still in progress and going very well. Final testing session on 5/7.
  - Coordination between the FA and SR analysts is in progress. Met 5/5 to finalize task list for the IT contractor that will start soon.
  - Coordination between the FA and SF analysts has resumed. Met 5/4 to coordinate the on-site visit of the SF consultant the week of June 1.
  - FA Document Review & FA Communication Review sub-committees meet weekly.
  - Continuing regular discussions with the PS FA Liaison Committee on business process decisions that must be made in order to advance the project.

- **Overall Status** will remain yellow unless current risk and schedule mitigation strategies prove inadequate.

### Accomplishments Since Last Report:

- **Project report:**
  - Configuration tasks continue to run behind schedule due to outstanding business decisions and customizations not yet implemented. Working with IT Management to augment project resources. **Note:** A PeopleSoft contractor will be joining the IT project team as soon as the final contract paperwork has been processed.
  - Customization development update:
    - Determining FA College – Phase I is complete and tested.
    - Creating FA Term records for FA-eligible academic plans, only.
    - Q1 & Q2 2015 patches tentatively scheduled for July 18.
  - Quarterly PS patch application schedule has been implemented to keep current with FA regulatory changes.
  - Campus unit testing of Packaging process scheduled April 23 & 30 and May 7.
  - A Student Financials consultant will be on-site the week of June 1 to assist with the integration of the Financial Aid, Student Financials and General Ledger modules.

- **Work Sessions and Meetings held:**
  - PS FA Technology Committee, Weekly on Thursdays
    - FA Document Review Sub-Committee, 4/23 & 4/30 - next meeting 5/7
  - PS FA IT Coordination Meeting w/Ciber, 4/23 & 4/30 - next meeting 5/7
  - PS FA-Student Records Coordination Team, 5/4 - next meeting TBD
  - PS FA-Student Financials Coordination Team, 5/5 - next meeting TBD
  - FA Data Security & Auditing, 4/28 - next meeting TBD
IT Project Status Report
Los Rios Community College District
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- Business process issues discussed with the FA Implementation Liaison Committee 5/6:
  - FA Document Standardization (Issue #3) – Roy is actively meeting with this committee.
  - Communication Plan (Issue #20) – Roy is actively meeting with this committee.
  - Identification of Remedial Courses – Campuses to identify remedial courses prior to 2003.
  - Program Completion – A&R Supervisors to put topic on SA Liaison Team agenda.
  - Direct Student Loan Requests – Campuses to discuss options.
  - Federal Work Study Requests – Campuses to discuss options.

- Decisions received from Project Leadership Team since last report:
  - None

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Project Risks:

- **Policy & procedure issue resolution:** The project time line assumes that policy & procedure issues will be addressed in a timely manner in order to facilitate business process configuration and testing, as scheduled.

  **Outstanding business decisions/factors identified as potential risks:**
  - IT resource availability for project milestones, including customization development and data prep.

Project Issues:

- None this report.

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**Color Key**

- **Green**: Strong probability item will meet dates and acceptable quality.
- **Yellow**: Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.
- **Red**: Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.
Introduction

We are interested in gathering your feedback on the implementation of PeopleSoft Financial Aid (PSFA) since the kick off of July 8, 2014. Your participation in this survey will assist the initiative with program improvement efforts. The results will be shared with the Leadership Team and work group members. Your responses are voluntary and anonymous. Responses will not be identifiable by any one individual to allow you to be completely candid in your answers. All responses will be compiled together and analyzed as a group. This survey takes about 20 minutes to complete.

For more information or questions regarding this survey please contact Victoria Rosario at rosariv@losrios.edu

1. Please indicate your role(s) in PSFA (check all that apply)

PeopleSoft Financial Aid Technology Team
Project Leadership Team
PeopleSoft Financial Aid Liaison Team
District Wide Financial Aid Advisory Committee
Vice Presidents/Deans Student Services Council
Campus Implementation Team

Other (please specify)

2. When did you start working on PSFA?

At the project's inception
A year or more ago
Six months to less than a year ago
Less than six months ago

3. Are you still actively involved with PSFA?

Yes
No

If no, why not?

4. Are there any concerns you have with the way the project is being implemented?

Yes
No

If yes, please describe:

Governance

5. Please rate your level of agreement with the statements below regarding your participation in PSFA.
The roles and responsibilities between the Technology Team, Liaison Team, and Campus Implementation Teams are clearly defined. I understand the different roles of people on the PeopleSoft Financial Aid Liaison Team. I am aware of the roles performed by the campus implementation team at my campus. I am familiar with the decision making process regarding the project. I have ample opportunities to voice my input. My input is taken into consideration when decisions are made.

Strongly Agree
Agree
Disagree
Strongly Disagree
Don't Know
If you disagreed with any of the statements above, please let us know how those areas can be improved.

6. How important do you believe having representatives from each group are to the success of the implementation project?

Faculty
Students
Classified Staff
Administrators
Deans
Other

Very Important
Somewhat Important
Not Very Important
Not At All Important
Don't Know

7. How well do you believe each of the following stakeholder groups are represented on the project?

Faculty
Students
Classified Staff
Administrators
Deans
Other

Very well represented
Somewhat represented
Not very well represented
Not at all represented
Don't Know

Please share any other stakeholder group(s) that you think should be represented on this initiative, but are absent.
Implementation Planning

8. Please rate your level of agreement with the statements below regarding your understanding of PSFA’s implementation project.

I am aware of the overall goals of the project.
I am familiar with the timeline for district wide implementation of PSFA.
The kickoff meeting packet provided a comprehensive roadmap for implementation.
The project leadership team is effectively monitoring progress through the work plan.
I am confident we will accomplish its stated goals within the planned timeline.

Strongly Agree
Agree
Disagree
Strongly Disagree
Don't Know

If you disagree with any of the statements above, please let us know how those areas can be improved.

9. Please rate your level of agreement with the statement below regarding the testing phase.

I am aware of the roles and responsibilities for testing.
I am aware of when the testing phase(s) will take place.
The colleges are each adequately preparing for the testing phase.

Strongly Agree
Agree
Disagree
Strongly Disagree
Don't Know

Communication and Engagement

10. Please rate your perceptions of how effective communication is between:

PSFA Technology Team and PSFA Liaison Committee
PSFA Liaison Committee and Project Leadership Team
Project Leadership Team and District Wide Financial Aid Advisory Committee
District Wide Financial Aid Advisory Committee and PSFA Liaison Committee

Very Effective
Somewhat Effective
Not Very Effective
Not At All Effective
Don't Know

If not effective, why not?