

Process Expert Team – Admissions & Records Annual Summary Report – 2012-2013

The Admissions and Records Process Expert Team met monthly during 2012 – 2013. The team currently consists of staff that hold either the Senior or Lead Admissions and Records Assistant position from CCC, DVC including SRC and LMC including Brentwood Center. With increased teamwork and improved communication, we accomplished a great deal this year.

Projects/Agenda items:

- **Attendance at CACCRAO and 3CDUG conferences and workshops**
PET members attended the CACCRAO and the 3CDUG conference and workshops. PET members representing all three campuses were in attendance this year. Participating in these events provide excellent networking and problem solving with other colleagues from colleges throughout California.
- **Continued working closely with the A&R Directors Committee**
The A&R PET team and the A&R Directors Committee continue to work closely together. Updates are presented to each group at monthly meetings. Sharing information clarifies specific Title 5 questions as well as direction to policy changes and proposed district-wide changes.
- **Continued work on Degree Audit**
The Degree Audit is a work in progress. Catalog years/updates are to be entered on a regular basis. Currently we are fine tuning the rules.
- **Improved Procedures**
This year we continued to focus on processes and procedures within the Admissions and Records office and work with District IT to test software updates. We are looking forward to the new eTran process for electronically sending and receiving transcripts. A number of colleges are on board with the program and we look forward to additional colleges adding to the list.
- **Revised the Incomplete Grade Contract**
A great deal of time went into the Incomplete Grade Contract procedure change as well as changing the form. The new form includes detailed instructions from Title 5. The Division/Instructional Dean's signature and the Director/Registrar signature have been added in addition to the instructor's signature and the student's signature or email. Instructions include detailed information regarding instructors entering the "I" grade along with the in lieu of grade (IB, IC, ID, and IF). Pass/No Pass classes are instructed to be entered as "IN". The new form and clear instructions will assist faculty when issuing an incomplete.
- **Revised the Residency Reclassification**
The Residency Reclassification form has been revised. The team expects less confusion from students regarding the reclassification process and required documents which are submitted to the Admissions office. The team is working on a staff guidelines when unusual circumstances and documents are submitted.

The A&R PET team continues to focus on working together to improve departmental practices to benefit our students. We will continue to meet monthly. District IT also has played a major part improving the services we offer to our students, this committee and staff.

Sonia Herz, Chair
Admissions & Records PET

Outcomes and Accomplishments of the Curriculum PET 2012-13

The 2012-13 academic year was particularly challenging for the Curriculum Management PET because of a number of high priority issues. The most pressing and time-intensive work resulted from the repeatability regulations set to go into effect in fall 2013. With a few exceptions, nearly all courses with repeatability went through the Curriculum Committees to have repeatability removed, and the schedulers had to process and implement these changes within short timelines. In addition, course “families” were developed in response to repeatability restrictions for PE, Dance, Music, Art, and Drama, and the schedulers were responsible for associating courses to families and assigning the appropriate “equates” for those families. These projects required schedulers to make changes for over 750 courses at DVC, LMC and CCC. Because of the complex nature of these tasks, the PET members collaborated continually, both as a group and by phone and email.

Implementing the new repeatability regulations and reporting course changes to the State Chancellor’s Office also required that new fields be added to the Datatel Colleague screen ACOI: “Course Family” and “Course Approval and Revision/Dates”. The PET members worked together with district personnel on the functional requirements of the new fields and the coding required for these fields, as recommended in the PET Datatel Colleague Training Plan.

Another big challenge in the past year involved maximizing FTES in response to fluctuating state budgets. The schedulers supported this effort by adding new sections, analyzing existing sections for appropriate coding, and, for DVC, adding 5 minutes to specific block schedule sections beginning fall 2013. These efforts involved reviewing current processes, establishing strategies for enhancements, and sharing process improvements, which are all stated goals of the PET.

In addition to these challenges, the Curriculum Management PET addressed the following items in the PET meetings, with the goal of advocating improvements and of establishing uniformity in the scheduling process:

- New calendar structure (term ending on Monday, Wednesday)
- Problems in FASC screen
- Coordinating units to hours
- Reorganizing the reporting tools in the InSite Portal
- Entering part-time non-instructional load in FMBS
- Monitoring full-time faculty for the 3.0 variance limit
- Adjusted subject titles in WebAdvisor as a result of DVC subject code changes
- Application forms for Classified employees who teach
- Community Ed schedule and registration process

The Curriculum Management PET members have also continued their efforts from the previous year of reviewing and requesting corrections and adjustments to the SQL Server Reporting Services.

Maria Barno, Chair
Curriculum Management PET

Financial Aid Process Expert Team (PET) 2012-2013 Annual Summary Report

Chair: Lizette Ponthier (7/12-12/12), Michael Keesey (1/13-6/13)

Sponsor: Viviane LaMothe (7/12-12/12), Lizette Ponthier (1/13-6/13)

The purpose of the Financial Aid PET team is to exchange ideas from CCC, DVC and LMC financial aid offices to develop best practices and improve services to students. Through the PET team, we exchange information and share knowledge, discuss new regulations, develop policy and procedures, problem-solve as a group to improve the effectiveness of our area. For 2012-2013, the PET focused on implementing large scale state and federal changes to the financial aid programs. Creating uniform financial aid policies & procedures, addressing compliance and audit findings that might arise as rules are implemented. Also, to project a clear and concise message to students regarding said changes to alleviate stress and office processing time.

In the 2012-13 academic year, the Financial Aid PET accomplished the following goals:

1. Pell & Direct Loan Reconciliation procedure
2. Pell Export & Locations procedure
3. Pell LEU SAR Comment Code Updates
4. California Dream Act (CDA) Implementation and Fee Waiver Awarding
5. R2T4 Subcommittee Report Best Practices
6. Multi-Campus Policy & Procedure Update
7. SEOG Award Criteria SQL Report
8. BOGW Fee Waiver Awarding Procedure Update
9. XISR Download Report Revamped
10. Pell Rounding, Overpayments Identified and Resolved
11. FERPA Release Form Created For District Wide Use
12. Student Communication Via InSite Portal Subcommittee Created
 - a. To Create District Wide Verbiage for Websites
 - b. Explore Communication Tools Through WebAdvisor Software
13. Re-conceptualize and Update Missing Information Letter (MIL)
14. Resolved ISIR Import Issues
15. Create District Wide Verbiage For Award Letter Voided Check Dates
16. Update Communications Management for 13-14
 - a. Bookmarks and Datatel Rules
 - b. New Forms to Match Verification Groups (V1-V5)
 - c. 9-month Budget Student Expense Budget
 - d. R2T4 60% Drop Date
 - e. Award Letter Template
17. Fee Waiver Import SQL Report Updated
18. Evaluated BOG Auto Packaging Procedures for Accuracy
19. 13-14 One Semester Loan Payment Splits
20. Unusual Enrollment History Rule (UEH) Implementation
21. District Wide Form for Declining Pell Funds
22. District Wide Consortium Agreement Form and Masthead
23. Uniform Verbiage for 13-14 Year Rule Changes
24. 600% Pell Rule

Goals for the 13-14 Academic year:

1. Cal Dream Act Grant Verification Policy and Procedure
 - a. Verification Form Creation
2. Investigate SAP setup for Fee Waiver Program for 14-15
3. District Wide Appeal for Unusual Enrollment Students
4. Procedure for Loan 150% Rule
5. Switch to Web Based OnBase Document Imaging

Process Expert Team - Human Resources & Payroll 2012-2013 Annual Summary Report

The Human Resources & Payroll PET team welcomed a new Management Sponsor, Dio Shipp and two new members, Lilly Harper and Joy Steinecke (CCC).

Our overall goal this year was to standardize and improve common processes. We also focused on using Datatel more effectively and better ways to serve our fellow employees.

Here's a recap of items/projects that we took on this year:

Furloughs and FTE Reductions – Employees that have their positions reduced in time or months are not being informed about how those changes affect their benefits. Several options were discussed. A set process will be implemented and approved by Dio.

WebAdvisor Address Changes – When employees move, they are directed to update their addresses via WebAdvisor. Employees assume that when they do this, their addresses are also updated with our health plans. That is not the case. Numerous calls have been placed to both departments from employees upset about their benefit information (ID cards, EOB's, etc.) being mailed to old addresses. All WebAdvisor address changes are now forwarded to Payroll after being audited by HR. Payroll updates the vendor websites.

Retroactive Hiring Procedures – Employees are being allowed to work prior to their new hire paperwork being completed and processed. This is a direct violation of our HR procedures. A communication will go out to all Managers.

Out of Class Assignments and Temporary Salary Increases - (On going) Managers are not communicating effectively with HR regarding continuation or termination of out of class assignments. Payroll consistently has to contact HR to find out the status. HR contacts the campus HRA's. Campus HRA's contacts the Manager. A better process needs to be instituted.

New Hire Paperwork - (On going) the goal is to have uniformity. Each campus uses different forms. We are reviewing the process so that we can standardize it. Kathy Griffin presented her packets for F/T Faculty, P/T Faculty, Regular Classified and Classified Hourly employees. She distributed samples to CCC and DVC HRA's. They will review her samples and discussions will continue. Some forms will be updated so that they can be used all campuses. Some information will be forwarded to new hires in links so that they aren't overwhelmed with paper.

Duplicate SSN's/Multiple ID Numbers – Ken generated a list that shows duplicate Datatel entries (142). SSN is the same but more than one Datatel ID number has been generated. In most cases, the name is exactly the same. In other cases, the last name is different or spelled differently. This clean-up is ongoing.

Universal Payroll Deduction form – This one form takes the place of 3 forms and multiple voluntary deduction cards. It is now available on our website.

XNAE – PET tested this new entry screen created for the College HRA's. It allows them to add new employees to Datatel, thereby assigning a new HR ID number. IT will notify the supervisor that the employee is red for Datatel access, phone, e-mail, etc.

Group Termination – This process was initiated last year. This year we streamlined it. Ken has created several queries using PET input to support this procedure. It is being done 4 times a year - 3 times for hourly/adjunct/students and 1 time for all permanent employees. 9 month gap in pay is the termination criteria used. This process saves the District money on licensing cost.

Timecards – (On going) goal is to create one timecard that serves all purposes. This is better for costs and for moving toward web-time entry.

While communication and sharing was excellent amongst members, our team was not as effective as it should have been. We were successful in the areas we focused on however we should have had a broader spectrum. Due to my work load and deadlines, we only had six meetings. The team will benefit from having a new Chairperson.

The goal for the 2013-2014 Process Expert Team is to following up and complete all outstanding items. Creation of desk manuals is also on the agenda.

Renita Mack, Chair
HR & Payroll PET

Process Expert Team—Purchasing Annual Summary Report – 2012-2013

In 2010, we came up with the concept of “Reqs to Checks”. This is a rather large document that we will be working on for several years, which will streamline the purchasing process. The first part of this concept was to create a document called “Requisition Check List”. The check list was designed to give all the essential information necessary for the person entering the data into Colleague, such as vendor name, general ledger and department chair approvals. This document was created in 2011-2012. The next phase was to create a document to guide current employees and to help new employees in entering requisitions into Colleague. This document, called How to Create a Requisition in Datatel Colleague, took all of 2012-2013 to create.

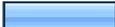
In the preliminary planning for this document, the committee interviewed many end-users at the campuses to get an understanding of how they are entering requisitions. It turns out that every campus was doing something different and there were many documents out there that someone has done in the past as a guide to entering requisitions. This created more motivation for the group to create a single document for the entire district to use.

After many months of interviews and debates, we were able to finish the document in June. The final product is attached.

In 2013-2014, the committee will be lead by a new chairman for the first time and the committee will continue to work on the rest of the concept. The next phase are: Creating a Purchase Order, Receiving an Order, Vouchering and Paying an Order.

Ben Cayabyab, Chair
Purchasing PET

1. To what Process Expert Team do you belong?

| | | Response Percent | Response Count |
|--|---|--------------------------|----------------|
| Admissions and Records |  | 16.7% | 3 |
| Curriculum Mangament and Faculty Information |  | 22.2% | 4 |
| Financial Aid |  | 27.8% | 5 |
| Human Resources and Payroll |  | 22.2% | 4 |
| Purchasing |  | 11.1% | 2 |
| | | answered question | 18 |
| | | skipped question | 0 |

2. To what extent did your Process Expert Team fulfill the following responsibilities?

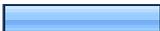
| | Never | Seldom | Frequently | Always | N/A | Rating Average | Rating Count |
|--|----------|-----------|-------------------|------------------|-----------|----------------|--------------|
| Represented the interests of all members in our functional unit | 0.0% (0) | 0.0% (0) | 50.0% (9) | 50.0% (9) | 0.0% (0) | 3.50 | 18 |
| Served as the liaison for our represented area to solicit input based on diverse business practices and needs within CCCCD | 5.6% (1) | 0.0% (0) | 38.9% (7) | 44.4% (8) | 11.1% (2) | 3.38 | 18 |
| Reviewed current business processes in our specified functional area | 0.0% (0) | 16.7% (3) | 33.3% (6) | 50.0% (9) | 0.0% (0) | 3.33 | 18 |
| Recommended strategies and solutions for business process improvement | 0.0% (0) | 0.0% (0) | 66.7% (12) | 33.3% (6) | 0.0% (0) | 3.33 | 18 |
| Documented potential opportunities for improvements in our functional areas either by best use of software system or by business process realignment | 5.9% (1) | 5.9% (1) | 52.9% (9) | 35.3% (6) | 0.0% (0) | 3.18 | 17 |
| Advocated improvements and enhancements in our specified area | 0.0% (0) | 5.9% (1) | 52.9% (9) | 41.2% (7) | 0.0% (0) | 3.35 | 17 |
| Recommended user and functional requirements to be included in software applications | 0.0% (0) | 0.0% (0) | 56.3% (9) | 43.8% (7) | 0.0% (0) | 3.44 | 16 |
| Reviewed and recommended workflow processes and application design specifications, and offered advice on setting priorities | 0.0% (0) | 11.8% (2) | 70.6% (12) | 11.8% (2) | 5.9% (1) | 3.00 | 17 |
| Participated in walk-throughs of the solution during the development cycle to ensure that the required functions and features have been developed according to the approved design | 0.0% (0) | 23.5% (4) | 35.3% (6) | 17.6% (3) | 23.5% (4) | 2.92 | 17 |
| Served as beta testers for implementing and testing changes to software and/or workflow | 5.9% (1) | 17.6% (3) | 47.1% (8) | 11.8% (2) | 17.6% (3) | 2.79 | 17 |

| | | | | | | | |
|--|-----------|------------------|------------------|-----------|-----------|------|-----------|
| Communicated the matters of the team to others in their business unit or those affected by changes in their area | 0.0% (0) | 11.8% (2) | 52.9% (9) | 29.4% (5) | 5.9% (1) | 3.19 | 17 |
| Promote data integrity by reviewing reports and encouraging data ownership for our respective areas | 0.0% (0) | 0.0% (0) | 50.0% (8) | 43.8% (7) | 6.3% (1) | 3.47 | 16 |
| Developed documentation, training guidelines and learning outcomes for functional users | 0.0% (0) | 16.7% (3) | 50.0% (9) | 27.8% (5) | 5.6% (1) | 3.12 | 18 |
| Trained new employees on subjects related to functional area and train existing employees on business process changes and/or new features in our functional area | 11.1% (2) | 33.3% (6) | 33.3% (6) | 16.7% (3) | 5.6% (1) | 2.59 | 18 |
| Reviewed and developed standards for user access and security for our functional area | 18.8% (3) | 37.5% (6) | 18.8% (3) | 12.5% (2) | 12.5% (2) | 2.29 | 16 |
| answered question | | | | | | | 18 |
| skipped question | | | | | | | 0 |

3. To what extent did you fulfill the following responsibilities?

| | Never | Seldom | Frequently | Always | N/A | Rating Average | Rating Count |
|--|----------|-----------|-------------------|-------------------|-----------|----------------|--------------|
| Attended all meetings, either in person or electronically, arranged in advance by the PET Chair | 0.0% (0) | 0.0% (0) | 23.5% (4) | 76.5% (13) | 0.0% (0) | 3.76 | 17 |
| Proactively participated and volunteered for specified tasks | 0.0% (0) | 5.9% (1) | 41.2% (7) | 35.3% (6) | 17.6% (3) | 3.36 | 17 |
| Completed action items in agreed upon timeframe | 0.0% (0) | 0.0% (0) | 58.8% (10) | 35.3% (6) | 5.9% (1) | 3.38 | 17 |
| Proactively provided PET with information and opinions on relevant issues from professional experience | 0.0% (0) | 5.9% (1) | 47.1% (8) | 47.1% (8) | 0.0% (0) | 3.41 | 17 |
| Solicited feedback from appropriate sources as required | 0.0% (0) | 17.6% (3) | 41.2% (7) | 35.3% (6) | 5.9% (1) | 3.19 | 17 |
| answered question | | | | | | | 17 |
| skipped question | | | | | | | 1 |

4. With which District location are you mainly affiliated?

| | | Response Percent | Response Count |
|--------------------------|---|------------------|----------------|
| CCC |  | 23.5% | 4 |
| DVC |  | 29.4% | 5 |
| LMC |  | 11.8% | 2 |
| DO |  | 35.3% | 6 |
| answered question | | | 17 |
| skipped question | | | 1 |

5. Please share any additional comments.

| | Response Count |
|--------------------------|---------------------------|
| | 3 |
| answered question | 3 |
| skipped question | 15 |

Page 2, Q5. Please share any additional comments.

- | | | |
|---|--|----------------------|
| 1 | As a relatively new member, I really like this committee; but I have observed that we start a project and then a new issue comes up that have more precedence at the time and the original issue then drops to the wayside. I am wondering if we have a record of some sort that lists the projects that have been started, but not completed for one reason or another, so we do not lose sight of the good ideas that are still pending. | Jul 9, 2013 9:31 AM |
| 2 | Our team is unorganized. There is no broadcast message to ask for agenda items. We do not get our agendas until the very last minute - moments before our meeting. Meetings are cancelled late. I feel that the PET team did not achieve anything concrete. We seem to hop around from subject to subject and unable to focus on a project. The XNAE process left a bad taste. This was an IT project - not a PET team project. Our team was not asked for input, we were just told that we are doing it and that permissions were granted by business managers (which was not true). Why have a PET team if IT is just going to move along without input on consequences of certain processes? I think that subject matter experts in the team were not utilized. It would have made for a better process rollout and buy in. | Jun 20, 2013 9:58 AM |
| 3 | Too many of the meetings this year were cancelled. Frequently our meetings were primarily about the new Datatel/SQL functions. In September, packets of HR hiring materials were distributed to all college HRA's with a goal of standardizing these across the district. At the request of the PET chair, I spent a weekend at home going through the packet and providing input on what I feel should be kept, not provided, or referred to online, rather than giving as paper handouts. We never again addressed this issue, and it is extremely important! I am frustrated about this. I appreciate being able to meet with my colleagues on a regular basis...sometimes it seems as though my issues are unique to my campus; it is a relief when I learn/hear that others have the same issues. | Jun 20, 2013 9:57 AM |