

## FINANCIAL AID STEERING COMMITTEE MEETING

### **NOTES**

**February 28, 2014**

**2:00p.m. – 4:45 p.m.**

***District Office – 5<sup>th</sup> Floor Conference Room***

Topic/Issue	Notes	Person Responsible	Timeline
Approval of 1/31/14 Meeting Notes	Approved	All	
PET Update	<p>2/20/2014 Meeting</p> <ul style="list-style-type: none"> <li>• UEH Policy sent to the PET by Jennifer Ma. PET plans to review and finalize procedure and appeal form by next meeting date</li> <li>• CM subcommittee already finalized bookmark and rules and sent to IT. IT waiting dates to load 14-15 payment schedule dates and budget before CM testing can proceed.</li> <li>• IT was sent list of ineligible programs by each college and rules have been put in place to prevent FA transmittals. Item complete.</li> <li>• SAP status now available to view in WebAdvisor. PET looking into posting info on student FA debt to WebAdvisor as well.</li> <li>• R2T4 subcommittee convened and is working on updating the P&amp;P</li> <li>• PET discussed which reports in SQL Reporting Services do not require SSN at IT request. PET requesting to know if reports can contain last four numbers of SSN or may be password protected.</li> <li>• Use of Softdocs was brought to PET by LMC, which as presented at 3CDUG conference. Import of docs available through OnBase through Workflow feature. Item will continue to be discussed at PET as more information is gathered.</li> <li>• CCC requested an SAP subcommittee be formed to discuss SAP assignment for students w/o SAP status. Each campus to assign rep.</li> <li>• IT reminded campuses that MIS clean-up should occur at the end of each term</li> <li>• PET discussed new Pell overpayment procedure of referring overpayments to DOE due to change in enrollment status. CCC wanted to</li> </ul>	Michael Keesey	

	<p>bring to the table collecting institutional portion of R2T4 liability however Lizette brought up that may not be able to since BOG apportionment collected for student fee waiver eligible. Item to be taken back to each campus for more research.</p> <ul style="list-style-type: none"> <li>• CCC learned that SARS could be utilized to send targeted communication to students. LMC and DVC currently use Colleague. Barbara will get more information and report back about SARS communication functionality.</li> </ul>		
Security Awareness Training	<ul style="list-style-type: none"> <li>• Mojdeh reported that Jeff Holden with state technology center for the Chancellor's Office is offering licensed online training materials regarding security awareness such as FERPA. Mojdeh asking that one person from each campus FA office be assigned to participate in a subgroup to identify modules that would benefit financial aid. Training will occur sometime during the summer. Names of subgroup need to be sent to Mojdeh by next FA Steering committee meeting (3/28).</li> </ul>		
District-wide Appeal Deadline for SAP Procedure	<ul style="list-style-type: none"> <li>• Currently, only two colleges (LMC and CCC) have appeal deadlines. DVC does not have an appeal deadline. Supervisors agreed to the following deadlines for 14-15. Fall appeals, Nov 1<sup>st</sup>, Spring appeals April 1<sup>st</sup>, and Summer appeals July 1<sup>st</sup>. The campuses would have the discretion to accept appeals after the deadline on a case-by-case basis. Dates approved by FA Steering committee.</li> </ul>		
Update on Ellucian Audit Priorities	<ul style="list-style-type: none"> <li>• DVC staff completed prioritizing Ellucian audit list. LMC and CCC have not had an opportunity to prioritize. DVC to share Ellucian priority list with LMC and CCC and supervisors will consolidate list at next supervisors meeting. Consolidated list will be submitted by next FA Steering committee meeting.</li> </ul>		
Processing Schedule/Freeze Date	<ul style="list-style-type: none"> <li>• Lizette forwarded draft policy to FA supervisors. Once reviewed and feedback incorporated into policy, draft will be forwarded to FA Steering committee for approval.</li> </ul>		

<p>14-15 Processing Calendar/Summer Payment Dates</p>	<ul style="list-style-type: none"> <li>Supervisors consulted and suggested changing summer 15 payment dates on proposed calendar to allow for paying students enrolled in summer sessions starting at different times, particularly since book funds need to be made available. Based on proposed schedules students would be paid after classes end. Multiple summer payment dates would allow greater flexibility. Lizette distributed proposed 14-15 payment dates with revised summer dates. Will be sent via email for fiscal to review.</li> <li>Upcoming summer 14 payments were discussed and the need to pay students enrolled in summer session with classes starting in May and June. Monica brought up the summer also challenging since there will be no lead time to run SAP so suggested school place students in pending status until Spring 2014 SAP is run. Krista noted that since Colleague set up to pay in July payment disbursed earlier will reject when exported. All agreed a work around would be needed and Lizette requested if an SQL report could be developed to identify students with Pell enrolled in summer sessions.</li> </ul>		
<p>RFI Financial Disbursement Services Update</p>	<ul style="list-style-type: none"> <li>Arzu suggested pushing back timeline as new information regarding use of third party vendors/debit cards scheduled to occur in next couple of months. District also needs opportunity to test so looking at starting summer 2015.</li> </ul>		
<p>District Position Update</p>	<ul style="list-style-type: none"> <li>Mojdeh reported that District position was approved by Chancellor's Cabinet and will be forwarded to March governing board meeting for approval. Anticipate a hire date of July 1.</li> </ul>		
<p>SB 70 Reporting</p>	<ul style="list-style-type: none"> <li>Chancellor's Office is currently working on getting data required for SB70 reporting by the March 1 (deadline March 31<sup>st</sup>)</li> </ul>		
<p>R2T4 Tracker Update</p>	<ul style="list-style-type: none"> <li>Ellen Forsman spoke with Lizette and looking into updating tracker and combining it with R2T4 report on SQL reporting service. No further updates at this time.</li> </ul>		
<p>Private Loans, Certification and Checks</p>	<ul style="list-style-type: none"> <li>DVC working on an internal draft of P&amp;P for approach to private loan requests, certification process, and issuing checks. DVC has seen a</li> </ul>		

	<p>jump of private loan requests and students requesting amounts exceeding CCCC student budget and may not be informed of federal student loan options. Emily suggests colleges follow the same protocol and will share P&amp;P draft so that district can agree to uniform approach based on best practices.</p>		
Consortium agreement	<ul style="list-style-type: none"> <li>DVC asked how each school approached consortium agreements specifically timing of payment (after courses completed or prior). Each campus agreed to review the contract language of their campus consortium agreement forms and follow-up.</li> </ul>		
Student Budget Assignments	<ul style="list-style-type: none"> <li>Tabled</li> </ul>		
MTF/SAP Monitoring	<ul style="list-style-type: none"> <li>Supervisors discussed that MTF appeal process differs by campus and each agreed that tracking MTF students by ed plan and paying accordingly was preferred to current process. FA Steering committee discussed the possibility of connecting a student's disbursement to their educational plan. Mojdeh proposed finalizing this process through the new FA district-wide Director/Dean.</li> </ul>		
External Audit Date update	<ul style="list-style-type: none"> <li>Arzu reported that client assistance package should be received next week. Dates set for April 7<sup>th</sup> – April 18<sup>th</sup>. Audit will begin at district office with the DVC being the main campus audit site (2-3 days). Arzu will follow-up once more information is received.</li> </ul>		
Joint FA/AR Meeting Update	<ul style="list-style-type: none"> <li>Monday, March 24<sup>th</sup> from 1:30-2:30 at DO</li> <li>Emily will look at last meeting agenda to develop items to include in next meeting's agenda and will send to all via email before the meeting</li> </ul>		
Other	<ul style="list-style-type: none"> <li>Monica suggested looking at third party agency verifications process and the communication between A&amp;R and FA. These verification forms require enrollment verif which FA cannot do but sending student back and forth between offices is time consuming and a more streamlined protocol needs to be developed. Item will be added to joint AR/FA meeting agenda.</li> </ul>		
<b>FUTURE AGENDA ITEMS</b>			

<b>NEXT MEETING</b>	Friday- March 28, 2014		
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Present:, Krista Ducharme(Fiscal), Vicki Ferguson, Mojdeh Mehdizadeh, Sally Montemayor-Lenz (Associate Vice-Chancellor of Educational Programs & Services), Gail Newman, Teresa Nicolas, Lizette Ponthier, Monica Rodriguez (CCC FA Supervisor), Arzu Smith, Emily Stone