DG6 ctcLink Go-Live Date Planning Guide

A few months before Go-Live, Ray Gartner will schedule a Legacy Shutdown Procedures overview meeting. This will be a high-level overview so you understand the process and who needs to be involved. Then, two meetings with each deployment group (A, B and C) are scheduled closer to Go-Live.

One meeting will be for PPMS shutdown and the second for FSM, SMS, and FA. A detailed spreadsheet will be provided with daily activities of Legacy jobs to run and specific tasks to complete.

How to use the planning table

Items listed in this table are based on college feedback for shut-down procedures at their colleges, broken down by recommended weeks.

> \# High-level deadlines are shown in red and labeled #. These are absolute last dates colleges can do these transactions, but you are welcome to set earlier dates.

> *Some activities may not be relevant due to quarterly college cycles and are labeled *. Each college needs to determine its own dates and ensure the college is aware of these dates and deadlines.

Activity	DG6-A Feb. 25-28, 2022	DG6-B April 22-25, 2022	DG6-C May 6-9, 2022
Training to be completed by (may have different dates for different groups)			
Six weeks before Go-Live	1/17-1/21/2022	3/14-3/18/2022	3/28-4/1/2022
Last day for budget transfers, operating budgets and grants into FMS			
Last day to make P-card purchases and pay airfare			
Four weeks before Go-Live	1/31-2/4/2022	3/28-4/1/2022	4/11-15/2022
Last day for start of term faculty contracts*			
HR – Last day to enter new jobs			
Last day to submit travel expense reports			
Last day for Purchasing dept. to receive approved requisitions			
Last day to submit Invoice Attached, Check Enclosed, and A19 documents.			
Three weeks before Go-Live	2/7-11/2022	4/4-8/2022	4/18-22/2022
Last Day HR processing or payroll changes (direct dep, W4, etc)			
Process 10th day contracts and grants to process indirects			
TERM STARTS*			
Two weeks before Go-Live	2/14-18/2022	4/11-15/2022	4/25-29/2022
100% tuition refund period ends*			
Last day hand drawn checks (payroll)			
Last invoice/AP, P cards posted, 100% refunds, travel posted- entry into HP, also rev/exp transfers and GL corrections			
Cashiering – last transactions#			

Activity	DG6-A Feb. 25-28, 2022	DG6-B April 22-25, 2022	DG6-C May 6-9, 2022
Financial Aid – last transactions# (no FA or scholarship disbursements after this date) Clearly communicate this to students and when they may expect funds after Go-Live (week 2)			
Last check print. Last Day for Bankmobile Run. Last Day for Student Refund Checks. Last day for FA manual checks and travel reimb.			
Legacy web admissions portals will close until new ctcLink admissions portals open. Note: All pending web admissions need to be matriculated before Legacy shutdown.			
Cancel all checks 6 months and older.			
Web transaction server down and no Cybersource. Campus CE – no more transactions (no changes to SMS, no Cybersource to use). Can't hold credit cards			
Remove web credit card and student transaction links from web site #			
Approve/submit timesheets			
Transition week - Legacy to ctcLink	2/21-25 (2/21 holiday)	4/18-22/2022	5/2-6/2022
Complete Payroll Processing in Legacy # No hand-drawn checks if timesheet not in and approved. Payroll must run before FMS month-end (process, errors, end)			
30-day student loan amount released – may need to cut checks early in order to disburse to students.			
Run forced check job – cut all checks before system is down.			
Last day to run AP checks#			
Finance Close prior month. Close all batches before running month-end. #			
Make sure to revise all scheduled jobs to run no later than 4:30 p.m. on the Thursday before go-live.			
Legacy Down noon Thursday# After all batch and production jobs have completed, access to the Legacy system will be restricted to conversion activities only. Noon – read only, 3pm down			
Classes – last day to register and pay for fall classes			
Web admissions should be disabled no later than today. Okay to take down earlier #			

Activity	DG6-A Feb. 25-28, 2022	DG6-B April 22-25, 2022	DG6-C May 6-9, 2022
Degree Audit – remove from web site (college determine if they want to stop using)			
Data Validation & Go approval#			
Go-Live Week	2/28-3/4/2022	4/25-4/29/2022	5/9-5/13/2022
Live on PeopleSoft Monday 8 am#	2/28	4/25	5/9
Begin entering transactions that were tracked manually.			
Begin processing new purchases through ctcLink.			
Timesheets in ctcLink All part-time hourly and student employees will begin submitting electronic timesheets through ctcLink Employee Self-Service. All employees will begin submitting electronic absence (leave) requests through ctcLink Employee Self-Service.			
First Payroll in PeopleSoft – staff need to have leave and hours in PS			
Go-Live Week 3+			
ctcLink Down for deployments – no transactions	4/25-29/2022 5/9-13/2022	5/9-13/2022	
Student Access to ctcLink			
Priority Registration Winter begins			
Continuing student Enrollment winter begins			
New student enrollment winter begins			
Continuing Ed registration			

Notes: Employee IDs are established before you begin work on the classes. You can create a crosswalk of Legacy SID to ctcLink EMPLID and make that available to staff, or use for supplemental systems. Student IDs are not established until Go-Live weekend. Once you are live you can create a crosswalk for students and make this information available to them prior to when you allow them into ctcLink.

Financial Aid Details based on 10/29/2019 Go-Live at Clark College

This list can be used to supplement the Legacy takedown information provided by Ray Gartner for FMS/SMS/FA.

Deadline	Process
September 13, 2019	FA complete 2018-2019 FISAP. Allows two weeks for Business Office to review, complete A/S portion and submit. Last Date to Contact PJs
September 20, 2019	Appeal Deadline (last day accepting documentation with a guarantee of review prior to conversion)
September 24, 2019	Last date to submit ISIR corrections and guarantee upload to FAM prior to file review/packaging deadlines.
September 23, 2019	FAFSA/WASFA completion deadline and documents submitted to ensure files are processed before conversion
September 27, 2019	Last day to issue fall W/S referrals. Allows for one week to apply + one week for background checks/employee file completion before hiring deadline. Last ISIR upload, data cleanup. Allow 2-day deadline to review and post coding for packaging report.
September 30, 2019	Last Data load report.
October 1, 2019	Take down WS online student employment site H2 tuition hold clean
October 2, 2019	Deadline to review 9/30 Data Load reports. Run and post TCs by end of day.
October 3-4, 2019	Last Packaging Report. Allows for 2-3 days to review and package all students for disbursement of funds the week of October 7.
October 7, 2019	Last SAS received. Unit Record Report due to WSAC for 2018-2019 aid year.
October 8, 2019	Last day for new W/S hire background checks.
October 9, 2019	Deadline to review Appeals submitted by 9/20/19. Allows students time to be notified, repackaged and request loan funds prior to cutoff dates.
October 10, 2019	Last R2T4 and overpayments reports
October 11, 2019	Upload final WSAC disbursement report. Allows 1-2 days to resolve edits, adjust awards, and notify A/S of funds to drawdown. Last date to request loan. Allows 1 day to process and originate by October 15. Take e-forms and student portal out of production for IT to update for dual-system processing. *Deactivate FAM Portal for the duration of dual processing* Last day to accept debt payments. Allows A/S and FA one week to process, reduce FAM and clear.
October 14, 2019	Deadline to adjust for R2T4's and overpayments
October 15, 2019	Last COD origination for Pell. Last COD origination for DL to include 30-day and single term loans. All TLR's due Last day to process any new hires, including w/s.
October 16, 2019	Last COD origination for DL to include 30-day and single term loans. Last Check Calculation and Auto-Application job runs.
October 17, 2019	Last FA disbursement. Last day to pay through any B902 charges. Last day to request any drop/adds or other enrollment adjustments (drop/adds, waivers applied, etc.) Suspend auto-application and check calculation.
October 18, 2019	Web transaction server down.
October 21, 2019	Reconcile all accounts prior to conversion. Equivalent of June year-end. Forced check job run to cut paper checks for 30-day loans and hold until 10/24 to release to students.
October 23, 2019	Fall 30-day loan disbursement date - paper checks in Cashier's Office

Deadline	Process
October 24, 2019	ALL LEGACY SYSTEMS GO DOWN. (two days)
October 27, 2019	Sunday data validation.
October 28-29, 2019	OFFICES CLOSED
October 30, 2019	Fall single term loan disbursement date - paper checks in Cashier's Office
November 1, 2019	E-forms & direct loans available (target date), Online student employment sites available in PS

Post Go-Live Tasks

Staff should not begin conducting transactions in ctcLink until the designated finance person has authorized transactions. This takes a few days. Prior to any Finance and SF related transactions the following will need to be done:

- Validate GL
- Create combo codes for grants
- Blanket POs

As you think about offices that need to be closed, here are some tasks that need to be done after Go-Live. These are listed here so colleges can plan to keep offices closed to complete this work. This is not an exhaustive list of everything that needs to be completed post Go-Live. Most SMES will be involved in daily sessions with SBCTC Support for the first 2 weeks. A schedule will be provided to the colleges.

Campus Solutions Work Go-Live week

Make sure you have reviewed QRGs so you know how to do these

- Students need to be term-activated
- Apply student groups to students where needed for priority registration and waivers
- Give students a registration time for your next term
    - Priority registration – may be done by student group if you have verified these
- Apply waivers to students so tuition will calculate correctly
- International residency
- Review your class capacities – especially for classes with a lab/lecture component.
- SF – verify student account balances

Other work to do (not critical):

- Buildings - check that they are all set up accurately, correct names
- DOB <1920 will need to be made accurate.
- Deactivate any programs (effective date) that a student can't enroll in
- Fix course capitalization issues
- 90 ISIR Suspense
- Preferred names for employees
- Ensure student kiosks have the correct configuration to all for students to pay their application fees (and likely tuition – but had not had any attempts).

Reminder – If you are offering payment plan for go-live term then you will process that all in Legacy and do one group post. You can test the group post in UAT.

Also, be prepared that you may not feel like you are ready to run any Drop for Non-Payment for the next term. To do this you need to make sure everyone has applied student groups and service indicators that will prevent drop for non-payment. If your SACR is set up well from the beginning, you may be able to accomplish this.

Which offices will have limited services or be closed to the public?

Purchasing	9/20 – 11/15		
Human Resources			
Cashiering			
Student Registration			