



GLOBAL DESIGN REVIEW (GDR) RECOMMENDATION SUMMARY DOCUMENT

Abstract

This document contains a summary of the recommendations produced through the Global Design Review (GDR) sessions and contains recommendations from all PeopleSoft pillars.

CHANGE HISTORY

VERSION	DATE	CHANGED BY	CHANGE
1	6/13/2018	Joe Carl	Original Document
2	6/25/2018	Joe Carl	Added summary for Working Group
3	6/27/2018	Joe Carl	Edits to summary for Working Group

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INTRODUCTION

Global Design Review (GDR) was a onetime event involving all 34 colleges participating in workshops aimed at helping attendees understand the Global Framework of ctcLink and how we have adapted PeopleSoft to support our unique model of multiple colleges in a single, shared instance of the product. In some sessions, this involved closing outstanding gaps in the Global Framework that require system-wide input. These items were reviewed and voted on through the various GDR sessions, and the resulting recommendations are documented here for review by the ctcLink Governance Working Group.

This document contains a summary of the recommendations produced from the GDR sessions for all PeopleSoft pillars, including cross-pillar topics. Detailed information about the sessions can be found in the ctcLink Project Information Canvas site (<https://sbctc.instructure.com/courses/1620486>) under the following modules:

- CROSS-PILLAR GDR SESSION ARCHIVE (MAY 2018)
- CS GDR SESSION ARCHIVE (MAY 2018)
- FIN GDR SESSION ARCHIVE (MAY 2018)
- HCM GDR SESSION ARCHIVE (MAY 2018)

SUMMARY

See the corresponding sections below for more detail.

1.1	<ul style="list-style-type: none"> • Add “Mx” Name Prefix to production • Add “Temporary” Address Type to production • Remove “Dormitory” Email Type • Change DORM Address Type description from “Dormitory” to “Residence Hall” 	Open Service Desk ticket	Joe Carl
1.1	Remove all education specific suffix types (see list)	Referred to Data Governance Group, carrying forward working group member opinion on the reporting benefits for identification of medical personnel.	Carmen McKenzie
1.1	Investigate creating a centralized state-wide email account versus customizing PeopleSoft to accommodate multiple email addresses for employees and students associated with multiple colleges	The Working Group will appoint a task force to investigate options.	Tara Keen, ctcLink Working Group Pat Daniels, IT Commission
1.1	Update gender-specific ethnic groups’ descriptions with a gender neutral version	Referred to OAA work group, providing a gender neutral description(s); any changes will be vetted with the Human Resources Management Commission	Scott Copeland
2.1	Descriptions of Academic Careers	Defer to Instruction Commission and Student Services Commission for final description. (No impact on the critical path.)	Scott Copeland
2.1	Change the Academic Program structure from global to local to accommodate Guided Pathways	Charge Data Governance in collaboration with Kristy Wellington-Baker, Guided Pathways Group Chair, to define the requirements for Guided Pathways. Vet them through appropriate Council/Commission liaison members and invite Joe Carl to aid in a Campus Solution fit/gap analysis of those requirements. Carmen to work with PMO for appropriate timelines for response back to Working Group.	Carmen McKenzie

2.2	Add new values to the Room Characteristics Table in production	Open Service Desk ticket	Joe Carl
2.3	Classic Class Search Warning Message	Schedule kick-off meeting with Admissions/Registration Council to call for a task force to review the student-facing messages	Joe Carl
2.4	Course Catalog Warning Message Class Search Warning Message Class Meeting Times Class Meeting Days	Schedule kick-off meeting with Admissions/Registration Council to call for a task force to review the student-facing messages and class search filters	Joe Carl
2.4	Instructor and Advisor personal information	Deferring next steps until the email task force has made its recommendations	Scott Copeland (on hold pending the email task force)
2.4	Annual (Year-round) Scheduling (Display Quarters in Class Search)	Schedule kick-off meeting with Admissions/Registration Council, and the Student Services and Instruction Commissions to call for a task force to assess implementation options for year-round scheduling/enrollment	Joe Carl
2.5	Student Financials Invoice Templates	Functional design in-progress Once design is completed it will be posted in Canvas module, host a webex and a walk through will be done with the original attendees of the GDR	Joe Carl
2.6	Student Financials Reconciliation	Functional project team will work with Spokane, Tacoma, and Clark to develop any needed reconciliation reports	Joe Carl
2.7	Financial Aid	No requested changes to global design	N/A

1.0 CROSS-PILLAR SESSION RECOMMENDATIONS

1.1 HCM/CS: BIO-DEMO MERGE/PERSON ATTRIBUTE INFORMATION

SESSION DESCRIPTION

In this session, the project team will review the cross-functional/integration tables between Campus Solutions (CS) and Human Capital Management (HCM). It will cover bio-demo data elements, the conversion process, and how the conversion logic processes students and employees who have been active at multiple institutions. We will also discuss best practices for processing employees who have an existing CS record and vice versa. Additionally, we will seek system-wide consensus on the common values that each table must contain in order for a successful sync from CS to HCM.

RECOMMENDATION SUMMARY

Three areas for consideration by the Working group

1. Personal Attributes-the following Cross-Pillar recommendations were made
 - a. Name Type-No Changes
 - b. Name Prefix Type- Add Mx
 - c. Name Suffix Type-Remove all Educational titles including DDS, DR, EDD, JD, RN, PhD
 - i. It was suggested in the session by HCM that these be moved to the title table, which upon review after the GDR may not be the best place to store this data. Further review and recommendation about a place to move these values would need to be addressed by both pillars
 - ii. After the session, using query it was determined that these name suffix are not currently being used in HCM and there are 84 IDs in Campus solutions using these titles, breakdown below
 - iii. If these suffixes are removed, the group must designate a data solution to identify employees with medical credentials.

DDS	52
Dr	1
EdD	9
JD	4
PhD	4
RN	14
Grand Total	84

- d. Address Type-Add Temporary
- e. Phone Type- Change Description of Dormitory to "Residence Hall"

- f. Email Type-Remove Dormitory; If centralized email is not used, additional student and employee email types for each college should be added (see consideration 2 below for additional details on Email type discussion)
- g. Voting Summary
 - i. 19 colleges voted to approve these changes
 - ii. 2 college districts voted to approve these changes
 - iii. State Board approved these changes
 - iv. 9 colleges Abstained due to no decision maker present
- 2. Email Type-Email Type is an issue that needs to be addressed for future conversions as the previous method will not allow for multiple institution emails, there were two options recommended to be reviewed by the Working Group. A Global Email solution vs creating college specific email types for both staff and students. A single recommendation was not made but a request for further review of these options by the working group
 - a. Option 1: A single centralized email for all colleges using a common email domain
 - i. The concerns identified by the group
 - 1. College IT staff vetting was requested by group
 - 2. Security concerns
 - 3. Email support responsibility and speed of support if handled by SBCTC
 - 4. Email quantity in a single email box
 - 5. Need for best practices around identification of source college in email subject
 - 6. Data storage for a single email account
 - 7. College specific distribution lists
 - 8. Loss of college specific identify connected to Email address
 - 9. Onboarding/Off boarding of email addresses would need to be global process and currently colleges onboard/off board email addresses at different times
 - ii. The benefits identified by the group
 - 1. Possible cost benefits in terms of licensing and support
 - 2. Students retain same email if they move between colleges
 - 3. Single email account to check for faculty/students connected to multiple colleges
 - 4. Able to lock down student ability to edit specified email type
 - 5. A single email account for Workflows
 - b. Option 2: Create college specific email types for each college for both students and staff
 - i. Concerns identified with each college having a college specific email type
 - 1. Currently the HCM work flows use the email address connected to the User Profile, there is only one email that can be used for these workflows currently and a college specific email type would require a significant redesign
 - 2. Currently some colleges have separate email for students/faculty
 - 3. Email type coding would need to be clear for students and staff as this is visible in self-service

- a. Determined after the GDR session: the email type display on the student homepage in PeopleSoft 9.2 comes from the Long Description which is 30 characters
- ii. The benefits discussed
 - 1. College autonomy for managing email processes
 - 2. Security of college specific communication being sent to college specific email account
 - 3. College identity
- c. A discussion appeared on the Admissions and Registrar Council (ARC) list serve after the GDR which relates to this GDR discussion, responses are gathered in the table below, the questions asked, does your campus use a college or personal email address for students and if they use a college email when is it active and when is it inactivated. A second question was asked later for those who use a college email, if the Admissions and Registration offices use the personal or college email to communicate to students.

College	Does your College off a college email?	When assigned	When Inactivate	Does your college primarily use college or personal to communicate with students?
Bellingham	Yes	Registration	After inactive 1 year	Both
Bellevue	Yes	Student creates		College
Cascadia	No	N/A	N/A	Personal
Clark	Yes	Admissions	Never	Both except FA uses College only
Clover Park	Yes	Admissions	After 1 quarter of non-attendance	College
Edmonds	Yes			College primary
Grays Harbor	No	N/A	N/A	Personal
Green River	Yes	Admissions	Never	
Highline	Yes	Admissions	Never	
Lake Washington	Yes	Admissions	Never	College
Seattle Central	College (In process for Fall 2018)	not sure yet	Never	
Shoreline	Yes			College primary
Olympic College	Yes	Admissions	Never for Graduates, 1 term of non-enrollment for non-graduates	
Pierce	Yes			College
South Puget Sound	Yes			College
Spokane	Yes (District)			Personal

Whatcom	Yes			College only as of 6/18/18
Wenatchee	Yes			Both
Walla Walla	Yes			Both
Yakima	No	N/A	N/A	Personal

- A parking lot item in this session was around the gender neutrality of Ethnic Group coding. There are five ethnic group codes in the system with a description that includes the masculine/feminine form, they are listed below. It was suggested that these descriptions include a gender neutral description. An example, the Ethnic Group code for Latin would have a description of Latino/Latina/LatinX. This will be referred to the Online Admissions Application workgroup and vetted with the Human Resources Management Commission before any changes are made in production.

Ethnic Group CD	Current Description
CHICAN	Chicano/Chicana
GUAJIR	Guajiro/Guajira
LATIN	Latino/Latina
MESITIZ	Mestizo/Mestiza
SUDAMER	Sudamericano/Sudamericana

VOTING SHEET(S)



GDR Decision Tracking Sheet - HCI

2.0 CAMPUS SOLUTIONS (CS) SESSION RECOMMENDATIONS

2.1 ACADEMIC STRUCTURE

SESSION DESCRIPTION

The Academic Career and Academic Program values were globally-defined at the beginning of the project. The project team will review the Academic Career values (Academic and Continuing Education) and the Academic Program values (Baccalaureate, Academic, Professional/Technical, Transitional Studies, Not Award Seeking, and Continuing Education) to ensure these global values fit current business processes and that their descriptions and attributes are accurate. Individual Academic Plans (e.g., welding certificate, business DTA, etc.) are not global and will not be focused on in this session.

RECOMMENDATION SUMMARY

- A. Academic Careers: There are currently two Academic Career values—“Academic” and “Continuing Education”. The attendees debated whether “Academic” is meaningful for students when they are selecting their intended programs in the admissions application. However, a consensus was not reached for a recommendation to replace “Academic”. The attendees agreed that they should not be the decision-makers for this particular issue. They recommended that this be reviewed by both the Instruction and Student Services Commissions.

- B. Academic Programs: The Academic Programs are currently globally configured. However, due in particular to Guided Pathways-related changes to entry, advising, and instruction, the global values no longer match the colleges’ practices. They recommended making the Academic Programs local rather than global with the intention of aligning the Academic Program codes with the Guided Pathways meta-majors.

However, since re-designing the Academic Structure would have an impact on the currently-live colleges, Data Services, and future deployment groups, the recommendation is for this issue to be reviewed by the Instruction and Student Services Commissions. If desired, the Commission(s) (or a Council of their designation) would bring this potential scope increase to the ctcLink governance for consideration. In coordination with the Guided Pathways working group (led by Kristi Wellington-Baker), Carmen McKenzie will bring this issue forward to Data Governance Committee which comprises members from all Councils and Commissions.

VOTING SHEET(S)



GDR Tracking
Academic Structure



GDR Tracking
Academic Structure

2.2 ROOM SCHEDULING

SESSION DESCRIPTION

The Room Characteristics Table is a globally-defined list of attributes that can be assigned to a Facility ID (building and room). Examples currently include "Facilities-Sink" and "Science-Anatomy/Physiol Equip". These Room Characteristics can be used when leveraging room scheduling software programs, including 25Live. The system supports 100 global values. The project team will review the current list and discuss whether updates should be made.

RECOMMENDATION SUMMARY

The group recommended adding the following 13 values to the Room Characteristics Table:

- Teleconferencing
- Printer 3D
- Wired Microphone
- Maps
- Smartboard
- Interactive Projector
- Interactive Display
- Dark Room
- Room Configuration Style 1
- Room Configuration Style 2
- Room Configuration Style 3
- Room Configuration Style 4
- Room Configuration Style 5

Since only 83 of the available 99 values are currently in-use in production, no current values need to be removed at this time. The vote was unanimously accepted.

VOTING SHEET(S)



GDR Decision
Tracking Sheet - Roc

2.3 INSTALLATION SETTINGS AND CLASS SEARCH

SESSION DESCRIPTION

The Campus Solutions Installation pages are used to configure various settings and defaults for specific business processes throughout the Student Records and Academic Advisement modules. In this workshop, the project team will review these global settings and their impacts to their corresponding business processes. The Student Records Installation page sets defaults for the Class

Search used by students, staff, and faculty. This page also establishes global settings for the Post-Enrollment Requisite Checking (batch drops for unmet requisites) business process. The Academic Advisement Installation page will be used to configure the student activities (enrollment, grading, graduation, transfer credit posting, etc.) that will cause the nightly batch job to create a new or refreshed Academic Advisement Report (degree audit). A system-wide consensus must be reached if the current settings for Class Search, Requisite Checking, and Advisement Reports need to be changed.

RECOMMENDATION SUMMARY

During this session, participants were asked to evaluate and vote on subtopics separately. The following recommendations were made for each subtopic.

Classic Class Search

1. The classic view of Class Search displays a warning message when 50 or more results are returned but allows the user to proceed. An error message is displayed if 10,000 or more results are returned and also prevents the user from proceeding. Participants recommended no changes be made to either limit value.
 - a. This recommendation passed with the following dissention:
 - i. One college recommended the warning limit be increased to 300 results.
2. The search criteria used to narrow results was reordered with FirstLink feedback shortly after go-live. Participants recommended the criteria values and sequencing remain as-is.
 - a. This recommendation passed with the following dissention:
 - i. One college recommended the Subject search criterion be changed from a drop-down list to a prompt search.
3. Participants recommended enabling instructions to display on the class results page and agreed the verbiage should be edited to provide more detail to a user. This configuration is currently disabled in the production environment.
 - a. This recommendation passed with the following notes:
 - i. Exact verbiage of the updated instructions will be decided upon via a working group at a future ARC meeting.
4. Additional class details can be enabled/disabled to display on the class details page. Participants recommended removing Campus from displaying.
 - a. This recommendation passed with no notes or dissention.

Post-Enrollment Requisite Checking (PERC)

1. Participants recommended a configuration change to display an enrollment warning message to students who have conditionally met a class requisite.
 - a. This recommendation passed with no notes or dissention.
2. When reviewing students for unmet pre-requisites, the PERC roster page automatically displays class details, requisite information, and filter options. Participants recommended no changes be made to this area.
 - a. This recommendation passed with the following dissention:

- i. Four colleges recommended the class detail and requisite information areas be collapsed by default.
3. Upon enrollment in a class with requisites, students are assigned a status of how they met the requisite; satisfied, not satisfied, permitted, enrollment component, conditionally satisfied, overridden, and unknown. All status filters are checked to display by default except for satisfied and unknown. Participants recommended the filter defaults remain as-is.
 - a. This recommendation passed with the following dissention:
 - i. Ten colleges recommended flagging the unknown status as well.
4. PERC is currently configured to allow drops for unmet requisites in batch or for an individual class. Participants recommended both options be kept available and processing options remain as-is.
 - a. This recommendation passed with no notes or dissention.

Academic Advisement

1. Student Activities used to Trigger New/Refreshed Report: No changes to current production configuration values.
 - a. Recommendation passed with no objections/comments
2. Display Refresh Link (Button) in Student Self Service Academic Advisement Report
 - a. Recommendation passed with the following comment:
 - i. Change wording of the Refresh link
3. Enable students to update Advising Notes
 - a. Recommendation passed with the following comment:
 - i. Verified local configuration option

VOTING SHEET(S)

Classic Class Search –



GDR Voting -
Classic Class Search

Post-Enrollment Requisite Checking –



GDR Voting - PERC

Academic Advisement –



GDR Decision
Tracking Sheet Acad

2.4 STUDENT SELF-SERVICE

SESSION DESCRIPTION

The student Self Service enrollment process has been overhauled in Campus Solutions 9.2. The project team will demonstrate the upgraded student enrollment process to ensure it aligns with college business processes and policies.

Additionally, the out-of-the-box error messages displayed to students when their enrollments are unsuccessful (e.g., due to unmet pre-reqs, a business office hold, etc.) are generic and do not always give students enough information about next steps. We will review the enrollment error conditions, the corresponding error messages, and, in some cases, the portions of the messages that cannot be edited. Due to the large number of error conditions and messages, re-crafting any message's wording will most likely need to take place by a separate working group.

RECOMMENDATION SUMMARY

Fluid Browse Course Catalog

1. Maximum Courses to Display & Warning Message – When browsing through the fluid Course Catalog, a configurable maximum of 50 results will display to a student. A warning message indicating this limit and instructions to narrow down the search is also displayed. Participants recommended the maximum number of results remain at 50 but agreed the message verbiage needs editing to be more student friendly and provide clearer instructions.
 - a. This recommendation passed with the following notes and dissention:
 - i. Exact verbiage of the updated warning message will be decided upon via a working group at a future ARC meeting.
 - ii. Two colleges agreed with the recommendation to change message verbiage but recommended increasing the maximum to 75 results.
2. Search Filters – Participants recommended removal of Campus and Academic Organization filters and to re-sequence to the following:
 - i. Subject
 - ii. Number of Units
 - 1) 0 Units
 - 2) 1 – 2 Units
 - 3) 3 – 4 Units
 - 4) 5 Units
 - 5) 6 – 11 Units

- 6) 12+ Units
 - iii. Typically Offered
 - iv. Grading Basis
 - v. Requirement Designation
 - vi. Course Attribute
 - vii. Open Entry/Exit
 - viii. Career
 - ix. Component
 - a. This recommendation passed with the following dissention:
 - I. One college recommended leaving Academic Organization as a filter.
 - II. Two colleges recommended changing the filter descriptions. One recommended changing the Typically Offered filter to Quarter Offered.
 - III. One college agreed with the recommendation to remove Academic Organization but abstained from voting on the other options.

Fluid Class Search

1. Number of Quarters to Display – The setting that controls which terms can be selected in the Class Search is a global configuration. Currently in production, summer and fall terms open on May 1, winter opens October 1, and spring opens January 1. Participants discussed remaining as-is versus the potential of moving to an annual schedule. However, many colleges have or will move to year-round scheduling. Due to business and student impacts of changing these settings, no recommendation could be made at the time.
 - a. Participants abstained from voting on this item with the following notes:
 - i. Further discussion amongst the ARC and IC groups is needed.
 - ii. Four colleges recommended an annual schedule.
2. Add Class Option – Participants recommend configuring the option for students to either enroll directly or add to shopping cart from the class search.
 - a. This recommendation passed with no notes or dissention.
3. Maximum Courses to Display & Messages Displayed – When searching through the fluid Class Search, a configurable maximum of 50 results will display to a student. A warning message indicating this limit and instructions to narrow down the search is also displayed. An error message is displayed if 10,000 or more results are returned and also prevents the user from proceeding. Participants recommended the maximum number of results remain at 50 but agreed the message verbiage needs editing to be more student friendly and provide clearer instructions.
 - a. This recommendation passed with the following notes:
 - i. Participants agreed the messages displayed should reflect the same verbiage as that shown in Browse Course Catalog. The same working group appointed by ARC will determine verbiage.
4. Default to Open Classes Only – Search results are defaulted to display open classes only, with the ability to remove this filter. Participants recommended removing this setting so all class statuses display by default.
 - a. This recommendation passed with the following dissention:

- i. One college recommended the setting be left as-is to display open classes only.
5. Instructor Contact Options – An instructor’s contact information including photograph, phone number, email, and address details can be enabled to display on the Class Search. Due to necessary input from Instruction SMEs, no recommendation was made at that time.
 - a. Participants abstained from voting on this item with the following notes:
 - i. A recommendation is required with participation from both ARC and IC groups.
 - ii. Two colleges recommended displaying instructor’s photograph, phone number, and email in the schedule.
 - iii. This decision is contingent upon the email task force’s recommendations. The Working Group will re-open this issue once email-related decisions have been made.
6. Class Search Filters –Participants recommended removal of Campus as a search filter and to re-sequence to the following:
 - I. Subject
 - II. Class Status
 - III. Course Career
 - IV. Number of Units
 - 1) 0 Units
 - 2) 1 – 2 Units
 - 3) 3 – 4 Units
 - 4) 5 Units
 - 5) 6 – 11 Units
 - 6) 12+ Units
 - V. Location
 - VI. Instruction Mode
 - VII. Academic Session
 - VIII. Academic Shift
 - IX. Class Meeting Days*
 - X. Class Start & End Times*
 - XI. Class Component
 - XII. Requirement Designation
 - XIII. Class Attribute
 - a. This recommendation passed with the following notes:
 - i. Participants agreed unanimously on the filter values and sequencing, but could not reach consensus on the value options within Class Meeting Days or Class Start & End Times. Colleges agreed to provide a recommendation after further discussion amongst the ARC group.

Fluid Enrollment Process & Enrollment Messages

1. Due to time constraints, the remainder of fluid enrollment could not be demonstrated during this session. Participants were briefed on the enrollment message catalog and shown where documentation of these messages lives on the ctclink Reference Center.
 - a. Participants agreed to review messages at a future ARC meeting and recommend changes as needed.

VOTING SHEET(S)

Fluid Browse Course Catalog –



GDR Voting - Fluid
Browse Course Cata

Fluid Class Search



GDR Voting - Fluid
Class Search

2.5 SF THIRD PARTY CONTRACT INVOICE & STUDENT STATEMENT TEMPLATES

SESSION DESCRIPTION

In this session the project team will review the system-defined invoice templates. It will cover the invoice configuration and invoice template for both third party contacts as well as student. Finally, we will seek system-wide consensus on the layout of the invoice and statement template within the WACTC system.

RECOMMENDATION SUMMARY

Two recommendations were voted on through this session:

- 1) Student Statement – Statement should include college logo, student name, address, date, amount due, student ID, single or multiple terms, detail for charges, payments and refunds, term and total balance due.
 - a. Recommendation passed with no objections
- 2) Third Party Contract Invoice #1 – Invoice should include college logo, invoice number, invoice date, term, amount due, organization name & address, student name, student ID, social security number (for military billing), charge description, charge amount and individual student total.

Invoice #2 should include college logo, invoice number, invoice date, term, amount due, organization name & address, student name, student ID, reference number (if applicable), charge description, charge amount and individual student total.

In addition a working group be created to investigate the working gap with 2nd notification invoices within Legacy and is rolling up charges an option. Further clarification is needed on whether student schedules can be printed on the third party contract invoice or does this violate FERPA regulations.

- a. Recommendation passed with no objections.

VOTING SHEET(S)



GDR Decision
Tracking Sheet - SF I

2.6 STUDENT FINANCIALS RECONCILIATION PROCESS

SESSION DESCRIPTION

The purpose of the session was to provide an introduction to the Student Financials module and its integration points with Finance; and an overview of best practices and tools available to reconcile Student Financials to Finance and identify any gaps. The session covered reconciliation topics such as daily cashing functions and reconciliation, 2nd journal set, accounts receivable, liability accounts and AP refunding.

RECOMMENDATION SUMMARY

The recommendation is to work with Spokane, Tacoma and Clark to develop a reconciliation process for year end closing FY18 using queries, reports and delivered Student Financials components. The reconciliation process will be documented and reviewed with the each college during their respective implementation to evaluate the fit and identify any gaps. The group does not anticipate any major differences in the reconciliation process between the colleges.

This recommendation passed the vote unanimously.

VOTING SHEET(S)



GDR Decision
Tracking - SF Recon

2.7 FINANCIAL AID

SESSION DESCRIPTION

1. App Processing/SNG/College Bound Scholarship: This session includes reviewing global and common configuration values that impact ISIR processing, State Need Grant and College Bound business processes. In addition, this session will review the global queries developed for ISIR Suspense, Ability to Benefit, SNG and College Bound Eligibility.
2. Awarding and Packaging: This session includes reviewing global and common configuration values that impact awarding and packaging. In addition, this session will review the global queries developed for mass packaging and tuition hold processes.
3. Disbursement/Loans: This session includes reviewing global and common configuration values that impact authorizing & disbursing financial aid and student loan processes. In addition, this session will review the global queries developed for Bank Mobile checklist assignment, loan disbursement & exit counseling notification processes.
4. Pell, SAP, R2T4, NSLDS, Work Study: This session includes reviewing global and common configuration values that impact Pell Grant, Satisfactory Academic Progress, Return of Title IV, Work Study Reconciliation, and Unit Record Reporting processes. In addition, this session will review the global queries developed for FISAP, R2T4, and NSLDS Transfer Monitoring processes.

RECOMMENDATION SUMMARY

No recommended changes from the current Financial Aid global design.

VOTING SHEET(S)



GDR Decision

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GDR Decision

Tracking Sheet FA_P



GDR Decision

Tracking Sheet FA_D



GDR Decision

Tracking Sheet FA_A