

**Peralta Community College District
Financial Aid Supervisor/Manager Meeting Minutes
Thursday, July 23, 2015**

Present: Jackie Vo/FA Sup-COA, Joseph Koroma/FA Sup-Laney, Phasasha Pharr/Interim FA Sup-Merritt, Loan Nguyen/FA Sup-BCC, Adela Esquivel-Swinson/Assoc.VC-District, Dominique Benavides/FA Sys Analyst-District, Brittany Dao/FA Clerical –District, Rodrick Fajarda/IT App Software Analyst-District

Lead: Dave Nguyen/Director of Financial Aid

Minutes: Brittany Dao/ FA Clerical - District

Agenda Item	Discussion	Follow Up Action (if needed)
I. District and Campus Updates	<p>Joseph gave a brief summary of their status with ECMC contract.</p> <p>Jackie said COA is in the process of signing the contract with ECMC. They want to start the agreement on August 1st. They had a training recently to make sure all staff are on the same page. COA will not be open on Fridays until 4:30 (They were previously open until 12:00PM on Fridays). They are planning on having more Financial Aid workshops (at least once a week).</p> <p>Sasha noted that Merritt is in the process of reconciling stale checks. They have workshops every Thursday for FAFSA and Dream Act. They have been intaking 15-16 paperwork. They have not had an official staff meeting yet. They are focused on completing all 14-15 applications to close out the year before starting with 15-16. Merritt is currently waiting for an estimate for the cost of using ECMC.</p> <p>Every campus says they are still accepting paperwork for 14-15, but plan to close all files out by the deadline (July 31st).</p>	N/A
II. 2015-2016 Packaging Criteria	<p>Dominique gave an update about 15-16 checklists. As of last week, 15-16 processes are running on a daily basis. 14-15 processes are having to be run manually. 15-16 processes are being run on Monday and Wednesday weekly.</p>	N/A

Dave mentioned that we have not been able to send out welcome letters just yet. Dominique mentioned that letters should be sent out on Monday morning via email. Sasha asked if staff would be able to view the welcome letter through View FA status page. Dominique said that it will be available once they are sent out, but they are planning on sending welcome emails out in chunks so campuses are not flooded with students that have questions about the letter. Dave welcomed staff to make suggestions about any letters that may be helpful to send out to students. Joseph requested award notification letters. Joseph also requests EFT letters for Loans. Dominique showed staff how to navigate to view the welcome letter in PeopleSoft.

Dominique notified staff that they have ran F15 SAP for students who were not enrolled in summer courses and students who have summer grades already posted. Sasha mentioned that she was looking into Foster Youth SAP to make sure they can be packaged with priority. Dominique said that they are sticking to the August 3rd deadline to package students. By August 3rd, district staff will package students who are ready to be awarded to make sure they get their Financial Aid on time for the Fall 2015 semester. Dave and Dominique mentioned that they will not be running SAP for students who have W grades with no attempted units until the problem is resolved.

Dave went over disbursement schedules. 25% of Pell the Thursday before school starts, 25% the week of school, and 50% at the midway point of the semester. He mentioned the issues the district had in 14-15 with overpayments and asked supervisors for their feedback with the new disbursement schedules. Joseph, Jackie, Loan, and Sasha all agree that it may be good to test this new disbursement schedule to help with R2T4 and overpayment issues. Jackie mentioned her concern for less than halftime students. Dominique mentioned that since all supervisors agree, they should be prepared for students to ask questions about the new disbursement schedule. Adela suggests that we come up with a statement as a District to inform students of the disbursement schedule changes so all campuses are on the same page. Dominique said that district staff will come up with a statement to post on Financial Aid websites.

Dave mentioned that Loan disbursements will be split as well. 1st semester

	disbursement will be 1st week of school and the 2nd will be at the midpoint of the semester. Sasha mentioned that Kent from Merritt suggests that Loan packets be recorded on the view FA status module. She stated that they will be working on verification files. Loan mentioned her concern about loan students who do not receive federal grants and rely on their loans to get through school. Dave commented that all supervisors now have access to disburse with override, so students in the loan situation may be disbursed with override. He stressed the importance that all staff document anything that may be considered special circumstances.	
III. Resolving Selective Service and Citizenship Comments	Dave went over resolving selective service checklists. He stated that the system is automatically completing checklists for 15-16 that were completed in 14-15 and asked for feedback from the supervisors. Dominique asked staff if they would like to auto resolve citizenship checklists-- only for checklist 146 (US Citizenship). Joseph suggests that each campus generate a query that reflects students that might be auto resolved and each campus can look through the lists and pull files to review and make sure the file is complete.	N/A
IV. Gainful Employment Programs/ Updating PPA	Dave informed supervisors that district staff will be providing them with the gainful employment files and suggests that they make sure they upload the file before the deadline. He stated that supervisors should make sure that all CIP codes match before submitting their files.	N/A
V. End of year tasks for each campus to complete: A) Reconciliation of Programs B) Review FY 2015 BFAP, FWS, and SEOG expenditures	Dave reminded supervisors that they should be reconciling all 14-15 files. September 30th is the deadline to make updates to COD. Staff should check HigherOne and follow up with students who have stale checks to validate if they're eligible-- If not the check should be voided. Either way, staff need to contact the student to inform them about their stale check. All FA Departments also need to reconcile their BFAP to make sure all funds were spent. Dave recommends monthly reconciliation of work study. He also suggests that supervisors keep in touch with each other for support.	N/A
VI. Comments & Questions	Joseph- Is it too early to work on exception requests? Dave- Chancellors office would like to receive requests within the first 2 months of the academic year.	N/A