

**California State University, Chico**  
**Financial Aid Office**  
**2004-2005 Annual Report**

**Annual Objectives 2005/06**

**Financial Aid and Scholarship Program Management**

1. Update Financial Aid and Scholarship outreach presentations and materials (PowerPoint, handouts). Enhance coordination with other units of the University that are involved in outreach. \* Establish communication and coordination with Butte College financial aid outreach efforts. Resume budget workshops for EOP and University Life classes. (Goal 3)
2. Improve communication and coordination with University Advancement, Foundation, College Development Officers and the individual scholarship committee chairs to enhance the operation of the university scholarship program. All entities involved in the University Scholarship process need to communicate effectively to make our interconnected, dependent processes work smoothly. (Goals 1,2,4,6)
3. Develop enhanced Financial Aid Appeal process, utilizing the campus Financial Aid Advisory Committee (FAAC) as the last level of appeal, per recommendation of Peer Review. (Goals 3,4,5,6)

**Software Systems and Applications**

4. Continue implementation of PeopleSoft. The following processes need to be set up, tested, and finalized: Satisfactory Academic Progress, Federal Work-Study, disbursement, Pell and Direct Loan reconciliation, imaging/workflow application. Analyze staffing/workload issues in new PeopleSoft environment. (Goals 1,2,4,6)
5. Revise the on-line scholarship application. Streamline university scholarship application processing to reduce paperwork and improve the timeliness of the selection of recipients. This will include a revision of the on-line scholarship application to include items that may be scored. (Goals 1,2,6)
6. Upgrade Student Employment Office software from non-supported Windows 98 product to web-based alternative product. Coordinate with Career Planning and Placement and Cooperative Education program to leverage product for campus use. (Goal 7)

\*FASO makes financial aid presentations and/or staffs informational tables at numerous outreach events including high school nights,

Summer Orientation, Summer Bridge, Getting Connected, EOP student assistant training, transfer student visits, Enrollment Management events, study abroad, etc.

## 2004/5 Annual Objectives

**Objective:** Establish a formal Quality Assurance program to check files, determine adherence to policies and procedures, and identify training needs. (Goals 1,2,3,4,5,6)

**Status: Complete**

Kentiner David has been assigned responsibility for quality assurance. His title has been changed from Assistant Director to Assistant Director of Quality Assurance and Compliance.

In this role, Kentiner monitors the work of our newest hires, and spot checks the work of our advising staff. He is responsible for attending relevant training, staying up-to-date with federal and state regulations, disseminating that information to the office, creating relevant procedures, and advising the Director on appropriate and compliant policy decisions. He is intimately involved with the PeopleSoft implementation testing and edit reporting, to ensure that our new system is working correctly.

**Objective:** Implement PeopleSoft Financial Aid module. Go-live date is March 2005. (Goals 1,2,3,4,5,6)

**Status: Ongoing**

We have implemented all available modules for Financial Aid and Scholarships, and we began sending email notices of awards in April. We continue to receive regular quarterly software releases, upgrades, and modifications from the CO. In addition, we continue to make our own modifications to enable us to do our work. PeopleSoft is not a complete or stable product, and much work remains to be done at each campus to make our processes work.

We are in the process of implementing the Satisfactory Academic Progress (SAP) module, released by the CO in May. The module has numerous bugs, and is taking a lot of time to set up. We expect to have it in a useable form this fall. We are also working on the Work-Study process in PS. This requires coordination with HR on the time and labor module, and promises to give us a better process than we had in our legacy system. We expect to have this working by the time school starts in August.

This will be an ongoing project for the foreseeable future. We will award 2006-07 aid this next spring, using PS version 8.0. We are scheduled to upgrade to 8.9 in time for our 2007-08 awards. This is a typical timeline for software upgrades, and we will continue to dedicate staff time to the project/processes.

**Objective:** Complete recertification process with U.S. Dept. of Education. (Goal 6)

**Status: Complete**

CSU, Chico's federal Program Participation Agreement (PPA) expired in 2001. At that time, the campus financial aid program was undergoing a peer review, coordinated by the Chancellor's Office. Due to the nature of the review, the Department of Ed put the campus on a provisional participation agreement for one year (2001 – 2002). When that agreement ended, the campus was again on a provisional PPA for three years (2002 – 2005). The standard time period for the PPA is six years.

This year, the Department recognized the ongoing improvements made to strengthen our program, and our recertification was confirmed. We are now fully certified, and no longer on a provisional PPA.