

California State University, Chico
Financial Aid Office
Annual Report of Goals
2003-2004

Annual Objectives 2004/05

1. 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)
2. Implement PeopleSoft Financial Aid module. Go-live date is March 2005. (Goals 1,2,3,4,5,6)
3. Complete recertification process with U.S. Dept. of Education. (Goal 6)

2003/04 Annual Objectives

Objective: Continue plans and set goals for CMS implementation. (Goals 1,2,3,4,5,6)

Progress: Dan Reed has been assigned to the Functional Lead role. Betsy Navarra is responsible for training and documentation, and Jim Cragle continues as the Technical lead. Kirk McCoskey was hired as backfill for Jim, and is currently being trained to take over as FARMS backfill also, in anticipation of Mark Carlsten's retirement. Training sessions have been stepped up and Kentiner David, Karen Navarro, Linda Nelson, and Eileen Ross have been assigned as "super-users." Staff training will be concentrated in November and January.

Objective: Prepare for Peer Review slated for April 2004 in preparation for recertification in 2005. (Goals 1,2,3,4,5,6)

Progress: Mary Robinson, Kay Burgess, and Steve Herndon returned for a follow-up visit in June, 2003. To date, we have not received a written report from their visit. They did make some suggestions regarding our Satisfactory Progress Policy, and some additional refinements that we might add to our Policies and Procedures Manual and our Professional Judgment Policy. The Procedure Review Committee is in the process of implementing those suggestions for the end of 04/05 and moving forward into 05/06.

Objective: Evaluate current functions/positions for Financial Aid and Scholarships to streamline processes and increase efficiencies. (Goals 1,2,3,6)

Progress: While we have begun the process of evaluating our workload and the distribution of tasks, it became apparent that the PeopleSoft implementation would significantly alter how we do our business. In light of that realization, we have postponed any significant reorganization or reassignment of tasks until after the implementation.

Objective: Reformat Policies/Procedures manual to conform to best practices and evaluate current policies for possible revision. Include Scholarship procedures and forms review. (Goals 1,2, 6)

Progress: We have updated our 03/04 Policies and Procedures manual and are finishing the 04/05 version. We will implement the new format with the beginning of our 05/06 aid cycle in PeopleSoft. Documentation of our processes has already begun as part of the PeopleSoft Business Process Guides, and this documentation will be incorporated with policies to make up our new manual.

Objective: Produce Financial Aid/Scholarship Master Calendar.

Progress: The outline has been created. It is being routed to various program areas within the office for additions. This calendar will be incorporated with our production calendar for our PeopleSoft batch processes, allowing us to plan our activities well ahead of time, around the know timelines we encounter in Financial Aid and Scholarships.