

Office of Financial Aid & Scholarships Goals and Objectives – AY 2003-04

Each year the Office of Financial Aid & Scholarships (OFA&S) identifies a set of goals and objectives to accomplish in an effort to improve and/or assess the various services provided by the office. The goals and objectives for the 2003-04 academic year include the following:

Goal 1: Common Origination & Disbursement (COD) System – The new federal COD processing system integrates separate Pell Grant and Direct Loan operating systems, web sites, and customer service centers, into one COD operating system, web site, and customer service center, using Extensible Markup Language (XML). Phase-In participants, like CSUB, are required to become Full Participants by 2004-05.

Objective 1: During AY 2003-04, the OFA&S will coordinate COD system implementation efforts with the CSUB Administrative Computing Services and Business Administrative Services departments in order to minimize the transitional effects of installing the new government processing system.

Objective 2: Staff will test and implement a number of processing changes including: new computer record layouts; use of a new COD Routing ID; and the monthly reconciliation of all funds drawn down by the school within 30-days of loan disbursement.

Goal 2: E-signature Master Promissory Notes (eMPN) - Implemented by the government in 2001, the federal eMPN process allows students to complete and electronically sign a loan promissory note via the Internet. The eMPN is then forwarded to the University electronically. Nationally, implementation of this new and complex electronic loan application process has proven to be technologically challenging for both students and schools. Consequently, school participation is voluntary.

Objective 1: During AY 2003-04, staff in the OFA&S will again assess the advantages and disadvantages of implementation of eMPN, taking into consideration recent updates in SCT Banner software.

Objective 2: By the completion of Winter quarter, 2004, staff will determine if it is appropriate for CSUB to utilize the federal eMPN process for the 2004-05 academic year.

Goal 3: Implementation of Banner 6.0 - Common Origination & Disbursement (COD) system compatibility requires that CSUB Administrative Computing Services convert the campus database operating system to the new Oracle version 9i and SCT Banner version 6.x. This new Banner version will constitute a major change from the current Graphic User Interface (GUI) environment to a Web-based environment.

Objective 1: During the month of August, OFA&S staff will participate in extensive software training and testing of the Financial Aid module as part of the new operating system and Web-based environment. This will ensure that the new software version operates in the same manner as the previous release, and that any new procedures that are needed to take advantage of new

functionalities are designed and implemented in an efficient and effective manner. In addition, because the Banner 6.x release is required to process the Pell origination and disbursement records for the 03/04 Summer quarter, and since there is a mandatory reporting deadline to the Dept. of Education, staff will need to maintain and process Pell Grant records in Banner 6.x in test exactly as they appear in the current version of Banner now in production. When Banner 6.x is installed, staff will then need to re-run the Pell origination and disbursement jobs to replicate in production what was done in test.

Objective 2: Staff will also complete a thorough review and update of office internal processing procedures to ensure compatibility with the new database operating system.

Goal 4: Policies and Procedural Manual Update - Continual update of the existing OFA&S Policies and Procedures Manual is necessary in order to meet staff needs for the proper administration of student financial aid programs in the current electronic and imaging environment.

Objective 1: During AY 2003-04, staff will continue to be involved in the update of the Policies and Procedures Manual. As part of this effort, designated staff with particular administrative oversight responsibility will receive specific sections of the NASFAA Policies and Procedures Manual template for review and further update.

Objective 2: Staff will continue to follow an on-going development and maintenance cycle for the Policies and Procedures Manual by creating and updating appropriate policies and procedures for the office, training of staff, implementation of these policies and procedures, and regularly evaluating the policies and procedures in an effort to keep them current.