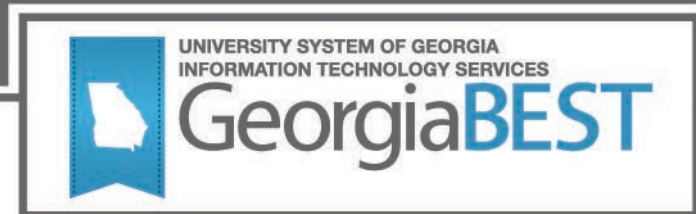UNIVERSITY SYSTEM OF GEORGIA
INFORMATION TECHNOLOGY SERVICES
GeorgiaBEST

Beta Test Plan

Financial Aid Data Collection (FADC) 20-21

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Test Plan for Financial Aid 20-21

This test plan is to be used for certifying the following changes:

- Collection of Free Application for Federal Student Aid (FAFSA) Tracking Data Elements (New)

- Collection of Return to Title IV (R2T4) Data Elements (New)

- Collection of Student Borrowing Data Elements (Modified)

- Discontinue Collection of Dual Enrollment Fee and Book Fund Codes (Modified)

- Fund Code Maximum Award Amounts (Modified)

- Trend Reports (Modified)

General Testing Instructions

Testing should be performed to validate the functionality being delivered with this release. In order to test this release thoroughly, we ask that you not only follow your normal business practices and processes to see if the modification runs correctly, but please try multiple scenarios that you might not encounter often in an effort to identify any anomalies in the process.

Support for Testing

For support during testing, contact the Academic Data Collections team:

Email: DW_Test@usg.edu

For emergency, business interruptions or production down situations, call the ITS Helpdesk immediately

- 706-583-2001

- Toll-free within Georgia: 1-888-875-3697

Returning Test Results

When testing is complete, return the completed test plan as an email attachment to DW_Test@usg.edu

Preparation for Testing

The FADC 1.4 release must be applied to your TEST database used to prepare for testing. Please follow the steps below to prepare for testing the release:

Step 1

Apply Financial Aid Release 1.4 to your TEST Banner database. If you are a hosted institution in production, we will contact the helpdesk to have a ticket opened, on your behalf, to request the software to be applied to your TEST environment. We will copy you on the communication to our helpdesk.

Step 2

Turn on the ITS version of GlobalProtect VPN (for beta testing only). For download, install, and login instructions, email DW_Test@usg.edu.

Step 3

Run the USG Extract in the TEST environment using the following URL:

https://appst.ds.usg.edu/ords/f?p=38576

(NOTE: If you experience access issues, please clear your bowser cache and ensure you are not using a bookmarked URL.)

Step 4

Review the Validation Error Summary and Data Collection Review reports to validate changes included in the release in the Cognos TEST environment using the following URL:

 https://analyticst.ds.usg.edu/bi/

Collection of Free Application for Federal Student Aid (FAFSA) Tracking Data Elements

Purpose:

The purpose of this change is to collect data for use in developing metrics that lead to a better understanding of how many students are not completing FAFSA verification, why they do not complete and to develop potential solutions to improve FAFSA verification completion.

Functionality delivered with this release:

This release includes the creation and collection of sixteen new data elements related to Free Application for Federal Student Aid (FAFSA) verification and tracking, a new EDI Cross-Reference Rules (SOAXREF) translation label and a table dump report for review of collected data.

Test Scenario 1:

In Cognos, select the Download as PDF link on the left side of the page under Data Dictionary. Verify that the following data elements are present in the Data Element Dictionary:

- FNT001 - FA Applicant Tracking Requirements Code
- FNT002 - FA Applicant Tracking Requirements Activity Date
- FNT003 - FA Applicant Tracking Requirements Satisfied Indicator
- FNT004 - FA Applicant Tracking Requirements Status Date
- FNT005 - FA Applicant Tracking Requirement Established Date
- FNT006 - FA Applicant Tracking Requirements Status Code
- FNT007 - FA Applicant Tracking Requirements Period
- FNT008 - FA Applicant Tracking Requirements Code Short Description
- FNT009 - FA Applicant Tracking Requirements Code Long Description
- FNT010 - FA Applicant Tracking Requirements Status Code Description
- FNT011 - FA Applicant Tracking Requirements Status Code Long Description
- FNT012 - FA Applicant Tracking Requirements Status Code Satisfied Indicator
- FNT013 - FA Applicant Status Verification Complete Indicator
- FNT014 - FA Applicant Status Verification Complete Date
- FNT015 - FA Applicant Verification Message

- FNT016 - Regents Requirement Code

- FNT017 - FA Applicant Tracking SBGI Type Indicator

- FNT018 - FA Applicant Tracking SBGI Code

- FNT019 - FA Applicant Tracking Surrogate ID

Test Scenario 2:

On the Academic Financial Aid tab in Cognos, verify the presence of the Table Dump – FA Applicant Tracking report on the left side of the page under Data Collection Review.

Test Scenario 3:

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Table Dump – FA Applicant Tracking report. Verify that the report contains all columns listed in Test Scenario 1.
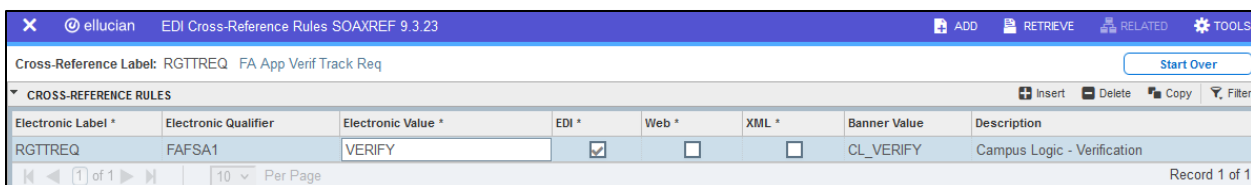
Test Scenario 4:

Using the report generated in Test Scenario 3, verify the Table Dump - FA Applicant Tracking report data against data in your institution's Banner environment for a sample of students. (Note: Please refer to the Financial Aid Data Dictionary in Cognos for data element source details.)

Test Scenario 5:

Create a new cross-reference label on the Banner EDI Cross-Reference Rules (SOAXREF) page for RGTTREQ - FA App Verif Track Req. This is a new label that must be added to the Banner EDI Cross-Reference Rules (SOAXREF) page.

Select an institutional Banner value for a FA Applicant Tracking Requirements Code (RRRAREQ_TREQ_CODE) for a tracking requirement that is used for FAFSA Verification at your institution. (Institutions that use Campus Logic for verification may have a single requirement code used for Campus Logic.) Translate the Banner value to electronic value 'VERIFY'. Be sure to use an electronic qualifier if translating more than one Banner value to a single electronic value.

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Table Dump – FA Applicant Tracking report. For a sample of students, verify the table dump report data against data in your institution's Banner environment. For some institutions, the ACADEMIC_TERM AND REGENTS_FUND_CODE columns may not have data. (Note: Please refer to the Financial Aid Data Dictionary in Cognos for data element source details.)

Test Scenario 6 (Optional):

Select an institutional Banner value for a FA Applicant Tracking Requirements Code (RRRAREQ_TREQ_CODE) for a tracking requirement that is <u>not</u> used for FAFSA Verification (Campus Logic). Translate the Banner value to electronic value other than 'VERIFY' on the EDI Cross-Reference Rules (SOAXREF) label RGTTREQ created in the above scenario. Be sure to use an electronic qualifier if translating more than one Banner value to a single electronic value.

In the example below, the requirement code 'ADMIT' with description 'Admissions Decision' is translated to electronic value 'ADMIT'.

Electronic Label *	Electronic Qualifier	Electronic Value *	EDI *	Web *	XML *	Banner Value	Description
RGTTREQ	FAFSA1	VERIFY	✓	☐	☐	CL_VERIFY	Campus Logic - Verification
RGTTREQ	ADMIT1	ADMIT	✓	☐	☐	ADMIT	Admissions Decision

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Validation Error Summary. Confirm that the following validation error fired for records with the FA Applicant Tracking Requirements Code used above.

VFNT001 - If Regents Requirement Code is not null then it must be a valid code.

Remove the translation created in this test step.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

Collection of Return to Title IV (R2T4) Data Elements

Purpose:

The purpose of this change is to track compliance with Federal requirements to calculate and return unearned Title IV funds to the Department of Education, when applicable, for student withdrawals.

Functionality delivered with this release:

This release includes the creation and collection of seventeen new data elements related to the calculation and return of Title IV funds and a table dump report for the review of collected data.

Test Scenario 1:

In Cognos, select the Download as PDF link on the left side of the page under Data Dictionary. Verify that the following data elements are present in the Data Element Dictionary:

- FNR001 - R2T4 Eligible Disbursement Amount by Fund

- FNR002 - R2T4 Actual Disbursement Amount by Fund

- FNR003 - R2T4 Eligible Awards Not Disbursed by Fund

- FNR004 - R2T4 Institution Required Return Amount by Fund

- FNR005 - R2T4 Institution Optional Return Amount by Fund on Student's Behalf

- FNR006 - R2T4 Student Required Return Amount by Fund

- FNR007 - R2T4 Student Post-Withdrawal Disbursement Amount by Fund

- FNR008 - R2T4 Student Revised Award Amount by Fund

- FNR009 - R2T4 Fund Lock Indicator

- FNR010 - R2T4 Calculation Lock Indicator

- FNR011 - R2T4 Student Total Title IV Aid Amount Earned

- FNR012 - R2T4 Student Total Title IV Aid Amount Unearned

- FNR013 - R2T4 Student Remaining Title IV Aid Remaining to be Disbursed

- FNR014 - R2T4 Total Title IV Aid to be Returned by Student and Institution

- FNR015 - R2T4 Total Title IV Aid Required to be Returned by the Institution

- FNR016 - R2T4 Total to Title IV Aid to be Returned by the Student

- FNR017 - Title IV Return Indicator

- FNR018 - R2T4 Sequence Number

- FNR019 - R2T4 Withdrawal Sequence Number

  FNR020 - R2T4 Surrogate ID Number

Test Scenario 2:

On the Academic Financial Aid tab in Cognos, verify the presence of the Table Dump – Return to Title IV report on the left side of the page under Data Collection Review.

Test Scenario 3:

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Table Dump – Return to Title IV report. Verify that a column exists for all data elements listed in Test Scenario 1.

Test Scenario 4:

Using the Table Dump – Return to Title IV report generated in Test Scenario 3, verify the table dump report against data in your institution's Banner environment for a sample of students. (Note: Please refer to the Financial Aid Data Dictionary in Cognos for data element source details.)

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

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Signature

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Collection of Student Borrowing Data Elements

Purpose:

The Financial Aid Data Collection (FADC) currently includes funds awarded, funds accepted and funds paid by Regents and institutional funds codes. The purpose of this change is to more accurately measure student borrowing increases/decreases through the addition of new data elements related to student borrowing.

Functionality delivered with this release:

This release includes the creation and collection of three new data elements for funds original offer, funds cancelled and funds declined. The existing Table Dump – Student Funds and Table Dump – Student Institutional Funds will be modified to include columns for the new elements.

Test Scenario 1:

In Cognos, select the Download as PDF link on the left side of the page under Data Dictionary. Verify that the following data elements are present:

- FNA044 – Fund Original Offer
- FNA045 – Fund Declined
- FNA046 – Fund Cancelled

Test Scenario 2:

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Table Dump – Student Funds report. Verify that the following new columns exist in the table dump report:

- REGENTS_FUND_ORIG_OFFER
- REGENTS_FUND_DECLINED
- REGENTS_FUND_CANCELLED

Test Scenario 3:

Using the Table Dump – Student Funds report from the above test scenario, verify the data collected for these new data elements against data in your institution's Banner environment for a sample of students.

Test Scenario 4:

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Table Dump – Student Institution Funds report. Verify that the following new columns exist in the table dump report:

- INST_FUND_ORIG_OFFER

- INST_FUND_DECLINED

- INST_FUND_CANCELLED

Test Scenario 5:

Using the Table Dump – Student Institution Funds report from the above test scenario, verify the data collected against data in your institution's Banner environment for a sample of students.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

Discontinue Collection of Dual Enrollment Book and Fee Fund Codes

Purpose:

The purpose of this change is to discontinue the collection of Dual Enrollment Book (DEBU, DEBD) and Fee (DEF) Fund Codes which are no longer covered by the Dual Enrollment program.

Functionality delivered with this release:

In the FADM Fund Code lookup table, the TO_AWARD_YEAR was changed to '1920' for Dual Enrollment Book and Dual Enrollment Fee fund codes. This will prevent these fund codes from being included in the Financial Aid data Collection for the 20/21 aid year.

Test Scenario 1:

In Cognos, run the FADM Fund Code report under Reference Tables > FADM Fund Code. Verify that the TO_AWARD_YEAR for REGENTS_FUND_CODE(s) DEBD, DEBU and DEF is 1920.

Test Scenario 2 (Optional):

Temporarily change the cross-walk on SOAXREF label RGTFAID for an existing fund code with awards for aid year 2021 to Regents Fund Code DEBD, DEBU or DEF. Perform an extraction in APEX.

In Cognos, review the Table Dump – Student Funds report to verify that data for the Regents Fund Code used above is not present.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

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Fund Code Maximum Award Amounts

Purpose:

The purpose of this change is to resolve a Known Issue from the Financial Aid Data Collection (FADC) for the 19/20 aid year. During the FADC for the 1920 aid year, some institutions encountered the following validation error related to Dual Enrollment Tuition and REACH fund codes:

 VFNA030 - Max Amount Awarded must be valid for the Regents Fund Code Submitted.

This validation rule evaluates fund codes and maximum aid year award amounts listed in the FADM Fund Code Reference Table (edw_fadm_fund_codes_lkp). The maximum award amounts listed for the Dual Enrollment Tuition (DET) and REACH (REACHD, REACHU) fund codes were found to represent the maximum award per term rather than the maximum award per aid year.

Functionality delivered with this release:

In the FADM Fund Code lookup table, the maximum award amounts for Dual Enrollment Tuition (DET) and REACH (REACHD, REACHU) were updated to reflect the maximum award per aid year.

Test Scenario 1:

In Cognos, run the FADM Fund Code (edw_fadm_fund_codes_lkp) report under Reference Tables > FADM Fund Code. Verify the MAX_AWARD_AMOUNT for the following Regents Fund Codes:

REGENTS FUND CODE	FUND CODE SHORT NAME	MAX AWARD AMOUNT
DET	Dual Enrollment Tuition	$15,400
REACHD	REACH-Disbursed Scholarship	$2,500
REACHU	REACH- Undisbursed Scholarship	$2500

Test Scenario 2:

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Validation Error Summary Report. Confirm that the following validation rule is not listed under Record Type (summary error) for the DET, REACHD or REACHU fund codes and associated maximum award amounts:

VFNA030 - Max Amount Awarded must be valid for the Regents Fund Code Submitted.

If this validation is present for the DET, REACHD or REACHU fund codes, verify that the award amount exceeds the aid year maximum for the applicable fund code.

Test Scenario 3 (Optional):

Temporarily change the cross-walk on the EDI Cross Reference Rules (SOAXREF) label RGTFAID for an existing Regents Fund Code listed in Test Scenario 1 so that the amount awarded will exceed the maximum award amount listed in the FADM Fund Code report. (For example, to trigger validation rule VFNA030 for the REACHD Regents Fund Code, temporarily change the Electronic Value for PELL to SEOG. Be sure to add an Electronic Qualifier as needed.)

Perform an extraction for the Financial Aid Data Collection 20-21 in APEX. In Cognos, review the Validation Error Summary Report. Confirm that the following validation rule is listed under Record Type (summary error):

VFNA030 - Max Amount Awarded must be valid for the Regents Fund Code Submitted.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

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Trend Reports

Purpose:

The purpose of this change is to make changes to the structure and content of multiple trend reports to reduce duplication and improve the presentation of data.

Functionality delivered with this release:

This change includes the following updates:

- **Trend Report – Student Funds** (Regents Funds Two Year Comparison): The summary tab will be updated to include HOPE/PELL/ZELL student counts and award totals.

- **Trend Report – Student Summary Two Year Comparison:** The report name will be changed to Trend Report – FAFSA Student Summary and the report will be split into two tabs:

  Income/Need Tab – Displays the total number of students, number of students with $ amount greater than or equal to zero, total $ amount and average $ amount for Expected Family Contribution, Student Financial Need and Student or Parent AGI.

  Loans Tab - Displays the total number of students, number of students with $ amount greater than zero, total $ amount and average $ amount for Aggr Subs Outstanding Loans and Aggr Unsub Outstanding Loans.

- **Summary by Award Year**: This report will be discontinued.

- **Current Year Report – Student Funds:** This new report is the Institution Funds Summary drill-down that was previously included in the Summary by Award Year report.

Test Scenario 1:

In Cognos, select the Trend Report – Student Funds (Regents Funds Two Year Comparison) from the menu on the left side of the page under Data Collection Review. Review the Regents Funds Two Year Comparison Summary tab to confirm that data is accurate and includes counts and totals for Regent's Fund Codes HOPE, PELL and ZELL.

Test Scenario 2:

In Cognos, verify that the Institution Summary by Award Year report is not present in the Data Collection Review report section. This report was replaced with the Current Year Report – Student Funds.

Test Scenario 3:

In Cognos, select the Current Year Report – Student Funds. For a selection of Regents Fund Codes, verify the counts and totals for Funds Awarded, Funds Accepted and Funds Paid by academic term.

Test Scenario 4:

In Cognos, select the Trend Report – FAFSA Student Summary (Student Summary Two Year Comparison). On the Income/Need tab, verify that the second data column heading reads "Total number of students with $ amount >= 0".

Test Scenario 5:

In Cognos, select the Trend Report – FAFSA Student Summary (Student Summary Two Year Comparison). On the Income/Need tab, verify the 'Total number of Students', 'Total number of students with $ amount >= 0' and 'Total $ Amount' for the 20/21 aid year against data in the Table Dump – Student Summary report.

Test Scenario 6:

In Cognos, select the Trend Report – FAFSA Student Summary (Student Summary Two Year Comparison). On the Loans tab, verify the 'Total number of Students', 'Total number of students with $ amount > 0' and 'Total $ Amount' for the 20/21 aid year against data in the Table Dump – Student Summary report.

Test Scenario 7:

In Cognos, select the Trend Report – FAFSA Student Summary (Student Summary Two Year Comparison). On the Loans tab, verify that the 'Average $ Amount' is calculated by dividing the 'Total $ Amount' by the 'Total number of students with $ amount > 0'.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title