UNIVERSITY SYSTEM OF GEORGIA
INFORMATION TECHNOLOGY SERVICES
GeorgiaBEST

Test Plan

Financial Aid Data Collection (FADC) 19-20

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Test Plan for Financial Aid 19-20

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

- Fund Code Maximum Award Amounts (modified)

- Discontinue collection of the Perkins Loan (modified)

- Modifications to the Financial Aid Data Element Dictionary (DED)

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

Please follow the steps below to prepare for testing the release:

Step 1

The FISAP Process (RORFS20) must be run for the 1920 aid year prior to extracting.

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 to validate changes included in the release in the Cognos TEST environment using the following URL:

https://analytics.tst.usg.edu/cognos/cgi-bin/cognos.cgi

Fund Code Maximum Award Amounts

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
OTHGTU	Ext Need Grants-NonDisb	30,000
ZHOPE	Zell Miller HOPE Scholarship	15,400
DIRECT	FDL Sub. Loans	15,000
PELL	Pell Grant	10,000
WISE	State Work Study	20,000
DLUNS	FDL Unsub. Loans	30,000
HOPEGD	HOPE Grants - GED	10,000
INSTLU	Instit. Loans-NonDisb.	35,000
SEOG	SEOG	6,000
HOPECT	HOPE Grants - Cert.	10,000
STGRU	State Need Grant-NonDisb	29,000
FEDLND	Other Fed. Loans-Disb.	60,000
FEDLNU	Other Fed. Loans-NonDisb.	48,000
HOPE	HOPE Scholarship	11,550

Test Scenario 2:

Using the FADM Fund Code (edw_fadm_fund_codes_lkp) report, verify that the TO_AWARD_YEAR is 1819 for the following Regents Fund Codes:

REGENTS FUND CODE	FUND CODE SHORT NAME	FROM AWARD YEAR	TO AWARD YEAR
PLUS	FFELP PLUS Loans	0001	1819
STFD	FFELP Sub. Loans	0001	1819
UNSTFD	FFELP Unsub. Loans	0001	1819

Test Scenario 3:

Perform an extraction for the Financial Aid Data Collection 19-20 in APEX. In Cognos, review the Validation Error Summary Report. Confirm that the following validation rule is not listed under Record Type (summary error):

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

If VFNA030 is listed, verify that the error is valid – the award amount exceeds the Maximum Award Amount for the listed Fund Code.

Test Scenario 4 (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 SEOG 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 19-20 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:

Signature

Title

Discontinue Collection of the Perkins Loan

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 PERK is 1718.

Test Scenario 2 (Optional):

Temporarily change the cross-walk on SOAXREF label RGTFAID for an existing fund code with awards for aid year 1920 to Regents Fund Code PERK. Perform an extraction in APEX.

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

Testing successful? (circle one) Yes/No

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

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Signature _____

Title _____

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Enhancements to the Data Element Dictionary (DED)

Test Scenario 1:

In Cognos, select the Download as PDF link on the left side of the page under Data Dictionary. Verify the following changes to each of the data elements listed below:

- **Financial Dependency Status (FNA007)**

  o The following values are listed in the Valid Values section:
    - 1: Independent - student is considered financially independent for financial aid purposes.
    - 2: Dependent - student is considered financially dependent on parents for financial aid purposes.

  o The Business Practice section displays the following:
    - The listed definitions in the reference table are consistent with those used to govern the granting of Title IV benefits (Pell Grant, SEOG, Stafford loans, etc.).
      The term parent includes biological and adoptive parents and stepparents.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2019
    - Change Notes: Added Valid Values, Removed Perkins reference from Business Practice section

- **FAFSA House Plans (FNA013)**

  o The following values are listed in Valid Values section:
    - 1: With Parents
    - 2: Campus Housing
    - 3: Off Campus

  o The Validation Rules section displays the following:
    - VFNA007 – If populated, FAFSA Housing Plans must be a valid code and not 'U'.

  o The Data Source section displays the following:
    - Provider: Banner
    - Table: RCRAPP1
    - Column: RCRAPP1_INST_HOUS_CDE
    - GUI Name: RNANAXX
    - GUI Label: Institutional Housing Plans on 'Information Release' tab
    - SOAXREF Translation Code:

  o The Change History section displays the following:
    - Aid Year: 1920

- ▪ Change Date: Oct 6, 2020
- ▪ Change Notes: Added Valid Values, Corrected Data Source Column

- **Father's Highest Grade (FNA014)**

  - o The Business Practices section displays the following:
    - ▪ The student FAFSA information is imported into Banner for each student on a yearly basis. The Father's Highest Grade is retrieved off of the FAFSA.

  - o The Validation Rules section displays the following:
    - ▪ VFNA008 – If populated, Father's Highest Grade must be a valid code and not 'U'.

  - o The following values are listed in the Valid Values section:
    - ▪ 1: Middle School / Junior High
    - ▪ 2: High School
    - ▪ 3: College or Beyond
    - ▪ 4: Other / Unknown

  - o The Change History section displays the following:
    - ▪ Aid Year: 1920
    - ▪ Change Date: Oct 6, 2020
    - ▪ Change Notes: Added Valid Values

- **Mother's Highest Grade (FNA015)**

  - o The Business Practices section displays the following:
    - ▪ The student FAFSA information is imported into Banner for each student on a yearly basis. The Mother's Highest Grade is retrieved off of the FAFSA.

  - o The Validation Rules section displays the following:
    - ▪ VFNA009 – If populated, Mother's Highest Grade must be a valid code and not 'U'.

  - o The following values are listed in the Valid Values section:
    - ▪ 1: Middle School / Junior High
    - ▪ 2: High School
    - ▪ 3: College or Beyond
    - ▪ 4: Other / Unknown

  - o The Change History section displays the following:
    - ▪ Aid Year: 1920
    - ▪ Change Date: Oct 6, 2020
    - ▪ Change Notes: Added Valid Values

- **Institutional Housing Plans (FNA016)**
  - o The Effective Aid Years section displays the following:
    - ▪ End: 1920

- The Change History section displays the following:
  - Aid Year: 1920
  - Change Date: Oct 6, 2020
  - Change Notes: Added Effective Aid Year End 1920

- **Supported Children Flag (FNA027)**

  - The Validation Rules section displays the following:

    - VFNA055 – If populated, Supported Children Flag must be Y or N.

  - The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation VFNA055 was updated to clarify that Supported Children Flag must be Y or N if populated.

- **Other Dependents Flag (FNA028)**

  - The Validation Rules section displays the following:
    - VFNA056 - If populated,   Other Dependents Flag must be Y or N.

  - The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA056 was updated to clarify that Other Dependents Flag must be Y or N if populated.

- **Parent Medicaid or Supplemental Security Income Receipt (FNA029)**

  - The Validation Rules section displays the following:
    - VFNA058 - If populated, Parent Medicaid or Supplemental Security Income Receipt must be Y or N.

  - The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA058 was updated to clarify that Parent Medicaid or Supplemental Security Income Receipt must be Y or N if populated.

- **Parent Supplemental Nutrition Assistance Program (SNAP) Receipt (FNA030)**

  - The Validation Rules section displays the following:
    - VFNA060 - If populated,   Parent Supplemental Nutrition Assistance Program (SNAP) Receipt must be Y or N.

  - Edit the Change History section to display:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020

- Change Notes: Validation Rule VFNA060 was updated to clarify that Parent Supplemental Nutrition Assistance Program (SNAP) Receipt must be Y or N if populated.

- **Parent Free or Reduced Price School Lunch Receipt (FNA031)**

  o The Validation Rules section displays the following:
    - VFNA062 - If populated, Parent Free or Reduced Price School Lunch Receipt must be Y or N.
  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA062 was updated to clarify that Parent Free or Reduced Price School Lunch Receipt must be Y or N if populated.

- **Parent Temporary Assistance for Needy Families (TANF) Receipt (FNA032)**

  o The Validation Rules section displays the following:
    - VFNA064 - If populated, Parent Temporary Assistance for Needy Families (TANF) Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA064 was updated to clarify that Parent Temporary Assistance for Needy Families (TANF) Receipt must be Y or N if populated.

- **Parent Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Receipt (FNA033)**

  o The Validation Rules section displays the following:
    - VFNA066 - If populated, Student Medicaid or Supplemental Security Income Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA066 was updated to clarify that Student Medicaid or Supplemental Security Income Receipt must be Y or N if populated.

- **Student Medicaid or Supplemental Security Income Receipt (FNA034)**

  o The Validation Rules section displays the following:
    - VFNA067 - If populated, Student Medicaid or Supplemental Security Income Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920

- Change Date: Oct 6, 2020
- Change Notes: Validation Rule VFNA067 was updated to clarify that Student Medicaid or Supplemental Security Income Receipt must be Y or N if populated.

- **Student Supplemental Nutrition Assistance Program (SNAP) Receipt (FNA035)**

  o The Validation Rules section displays the following:
    - VFNA068 - If populated, Student Supplemental Nutrition Assistance Program (SNAP) Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA068 was updated to clarify that Student Supplemental Nutrition Assistance Program (SNAP) Receipt must be Y or N if populated.

- **Student Free or Reduced Price School Lunch Receipt (FNA036)**

  o The Validation Rules section displays the following:
    - VFNA069 - If populated, Student Free or Reduced Price School Lunch Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA069 was updated to clarify that Student Free or Reduced Price School Lunch Receipt must be Y or N if populated.

- **Student Temporary Assistance for Needy Families (TANF) Receipt (FNA037)**

  o The Validation Rules section displays the following:
    - VFNA070 - If populated, Student Temporary Assistance for Needy Families (TANF) Receipt must be Y or N.

  o The Change History section displays the following:
    - Aid Year: 1920
    - Change Date: Oct 6, 2020
    - Change Notes: Validation Rule VFNA070 was updated to clarify that Student Temporary Assistance for Needy Families (TANF) Receipt must be Y or N if populated.

- **Student Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Receipt (FNA038)**

  o The Validation Rules section displays the following:
    - VFNA071 - If populated, Student Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Receipt must be Y or N.

- o The Change History section displays the following:
  - Aid Year: 1920
  - Change Date: Oct 6, 2020
  - Change Notes: Validation Rule VFNA071 was updated to specify that Student Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Receipt must be Y or N if populated.

Testing successful? (circle one) Yes/No

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

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Signature   _____

Title   _____