

Information Technology Services

University System of Georgia Information Technology Services

Data & Reporting Services

Test Plan

Financial Aid Data Collection

(FADC) - 22/23 Aid Year

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Test Plan for Financial Aid 22-23

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

- Collection of Georgia College Completion Grant Awards (New)
- Fund Code Maximum Award Amounts (Modified)
- Updates to the Data Element Dictionary (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 Data and Reporting Services 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

There are no changes to the Financial Aid Data Collection Banner scripts for this collection. No action is required from Banner Managed Services or Institutional DBAs.

Please follow the steps below to prepare for testing:

Step 1

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

Step 2

Run the USG Financial Aid 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 browser cache and ensure you are not using a bookmarked URL.)

Step 3

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/>

Georgia College Completion Grant

Purpose

The Georgia College Completion Grant, authorized under House Bill 1435 (2022), provides grants of up to \$2,500 for students who are close to completing their degrees (completed 80% of the required credits) and meet the economically disadvantaged criteria established by the GSFC. This grant was first awarded to students in Fall 2022 and will be collected starting in the Financial Aid Data Collection for the 2022-2023 aid year.

Functionality delivered with this release:

This release includes the creation of the following Regents Fund Code for the Georgia College Completion Grant:

FUND CODE	FUND CODE SHORT NAME	FUND TYPE CODE	FUND SOURCE CODE	FROM AWARD YEAR	TO AWARD YEAR	MAX AWARD AMOUNT
GCCG	GA College Completion Grant	NR	ST	2223	9999	2,500

The following validation rule was created under data element Fund Code (FNA003):

VSID053: There must be at least one student per institution with a GCCG Fund Code.

The following validation rule will evaluate the annual \$2,500 maximum award amount per student for the GCCG Fund Code:

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

Test Scenarios:

Test Scenario 1:

In Cognos, navigate to Reference Tables > FADM_Fund_Code to view the FADM Fund Code (edw_fadm_fund_codes_lkp) report. Verify that the GCCG fund code is listed in the report with the following values:

Fund Code: GCCG

Fund Code Short Name: GA College Completion Grant

Fund Code Long Name: Georgia College Completion Grant

Fund Type: NR

Fund Source: ST

From Award Year: 2223

To Award Year: 9999

Max Award Amount: 2,500

Testing successful? (circle one) Yes / No

Test Scenario 2:

Verify that the institutional fund code for the Georgia College Completion Grant is translated to Regents Fund Code 'GCCG' on the Banner EDI Cross-Reference Rules (SOAXREF) translation label 'RGTF AID'. (See Appendix B for additional information on creating translations in Banner.)

Extract for Financial Aid on the Data Collection Extraction Application (APEX). Sign into Cognos and navigate to Submission Status > Financial Aid Data Submission Status. Verify that the ETL Status shows 'SUCCESS' and the Status is '4 – ETL successful, but with errors' or '6 - ETL complete and data submission successful'. If not successful, please contact the Data and Reporting Services team at dw_test@usg.edu.

If validation errors exist, click on the link under 'Errors to be Corrected by Institution(s)'. If your institution awarded the Georgia Collection Completion Grant in the 2022 -2023 aid year, verify that the following validation error does not exist:

VSID053: There must be at least one student per institution with a GCCG Fund Code.

Testing successful? (circle one) Yes / No

Test Scenario 3:

In Cognos, verify that the following error does not exist for your institution for the GCCG Fund Code:

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

You may need to click the 'View / Download' link to determine if VFNA030 errors are related to the GCCG Fund Code. If the VFNA030 error does exist for the GCCG Fund Code, please verify that the error is correct – i.e., a student was awarded more than \$2,500 for the Georgia College Completion Grant.

Testing successful? (circle one) Yes / No

Test Scenario 4:

In Cognos, navigate to Data Collection Review > Current Year Report – Student Funds to view the Current Year Report – Student Funds report.

- a. Verify that the report includes the Georgia College Completion Grant.
- b. Using the Total Students Paid, Total Students Awarded and Total Students Accepted links, verify that GCCG data for a selection of students matches data in your Banner test database.

Testing successful? (circle one) Yes / No

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

HOPE and PELL Maximum Award Amounts

Purpose

For the 2022 – 2023 aid year, the maximum HOPE Scholarship and HOPE Grant award per semester at a USG institution increased from \$3,840 to \$4,620. Based on this change, the maximum annual award for the HOPE, HOPECT and HOPEGD fund codes need to be increased to \$14,000.

During beta testing of the Financial Aid Data Collection (FADC) 22/23 changes, both Georgia Institute of Technology and Abraham Baldwin Agricultural College encountered the VFNA030 validation error for Pell Grant awards that exceeded \$10,000. According to the 'Dear Colleague' letter at [REVISED 2022-2023 Federal Pell Grant Payment and Disbursement Schedules](#), the maximum Pell Grant award increased from \$6,495 to \$6,895 for the 2022-2023 award year.

The letter referenced above also includes a reminder that students may be eligible for 150% of the maximum annual award if certain criteria are met. Based on this information, a student could receive up to \$10,342 in Pell for the 2022 - 2023 award year. As a result, the maximum award amount for Pell should be increased.

Functionality delivered with this release:

In this release, the FADM Fund Code lookup table and the associated reference table will be updated with a maximum award amount of \$14,000 for the following Regents Fund Codes:

HOPE - HOPE Scholarship

HOPECT - HOPE Grants – Certificate / Diploma

HOPEGD - HOPE Grants - GED

The maximum award amount for the following Regents Fund Code will be increased to \$10,500:

PELL – Pell Grant

The FADM Fund Code maximum award amount is used by the following validation in evaluating awards per student for each fund code:

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

Test Scenarios:

Test Scenario 1a:

In Cognos, navigate to Reference Tables > FADM_Fund_Code to view the FADM Fund Code (edw_fadm_fund_codes_lkp) report. Verify that the maximum award amount is 14,000 for the following Regents fund codes:

HOPE - HOPE Scholarship

HOPECT - HOPE Grants – Certificate / Diploma

HOPEGD - HOPE Grants

Testing successful? (circle one) Yes / No

Test Scenario 1b:

In Cognos, navigate to Reference Tables > FADM_Fund_Code to view the FADM Fund Code (edw_fadm_fund_codes_lkp) report. Verify that the maximum award amount is 10,500 for the following Regents fund code:

PELL – Pell Grant

Testing successful? (circle one) Yes / No

Test Scenario 2a:

In Cognos, verify that the following error does not exist for your institution for the HOPE, HOPECT or HOPEGD Fund Codes:

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

You may need to click the 'View / Download' link to determine if VFNA030 errors are related to the HOPE, HOPECT or HOPEGD Fund Codes. If the VFNA030 error does exist for these fund codes, please verify that the error is correct – i.e., a student was awarded more than \$14,000 for the applicable HOPE fund code.

Testing successful? (circle one) Yes / No

Test Scenario 2b:

In Cognos, verify that the following error does not exist for your institution for the PELL Fund Code:

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

You may need to click the 'View / Download' link to determine if VFNA030 errors are related to the PELL Fund Code. If the VFNA030 error does exist for these fund codes, please verify that the error is correct – i.e., a student was awarded more than \$10,500 for the PELL fund code.

Testing successful? (circle one) Yes / No

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

Signature

Title

Data Element Dictionary

Purpose

During an internal review of the Financial Aid Data Element Dictionary (FADC DED), multiple formatting issues were identified. These issues included the presence of special characters, duplicate text and incomplete sentences. In addition, the Data Source for element Student's Financial Need (FNA008) was identified as being incorrect.

Functionality delivered with this release:

This release includes edits to the Financial Aid Data Element Dictionary to resolve formatting issues and to correct the Data Source for element Student's Financial Need (FNA008).

Test Scenarios:

Test Scenario 1:

In Cognos, navigate to Data Dictionary > Download as PDF to generate the Financial Aid Data Element Dictionary. Verify that the referenced sections were updated as shown for the following data elements:

- Award Year (FNA001)
 - The Business Practices section should display the following:
 - Note that an academic year as defined by the Board of Regents may differ from the award year defined by the institution. The BOR academic year calendar includes Summer-Fall-Spring, while most institutions define an award year as Fall-Spring-Summer.

The System Office defines an award year as the Fall-Spring-Summer semesters.
- Fund Code (FNA003)
 - The Change History section for Academic_Term 1819 should display the following:
 - These business rules were added - VSID044, VSID045, VSID046, VSID047, VSID048, VSID049, VSID050, VSID051, VSID052. These business rules were updated - VSID036, VSID041, VSID042.
- Student's Financial Need (FNA008)
 - The Data Source section should display the following:
 - Table: RNVAND0
 - Column: RNVAND0_GROSS_NEED

- The Change History section for Academic_Term 2223 should display the following:
 - ACADEMIC_TERM: 2223
 - CHANGE_DATE: Oct 10, 2023
 - CHANGE_NOTES: Edited the Data Source Table and Column.

- Aggregate Subsidized Outstanding Loans (FNA010)
 - The Business Practices section should display the following:
 - This element excludes current year subsidized loan obligations.

This data is received from the current academic year ISIR record for the student. The data reported from the Federal NSLDS database reports all cumulative loan data excluding the current academic year. For reporting purposes, calculation of the total student indebtedness, will include outstanding subsidized and unsubsidized loans plus all current loans disbursed for the present academic year.

Example: NSLDS reports that the Student (who is a 5th year Senior) has received \$2625 his freshman year, \$3500 his sophomore year, \$5500 his Junior year, \$5500 his Senior year, therefore has a cumulative loan debt of \$17,125. The FA office must also then refer to Present Academic year disbursed of \$5500 in order to determine the total cumulative loan debt and to ensure that the student has not exceeded his maximum Stafford loan eligibility of \$23,000.

- Aggregate Unsubsidized Outstanding Loans (FNA011)
 - The Business Practices section should display the following:
 - This element excludes current year unsubsidized loan obligations.

This data is received from the current academic year ISIR record for the student. The data reported from the Federal NSLDS database reports all cumulative loan data excluding the current academic year. For reporting purposes, calculation of the total student indebtedness, will include outstanding subsidized and unsubsidized loans plus all current loans disbursed for the present academic year.

Example: NSLDS reports that a student (who is a 5th year Senior) has received \$2625 his freshman year, \$3500 his sophomore year, \$5500 his Junior year, \$5500 his Senior year, therefore has a cumulative loan debt of \$17,125. The FA office must also then refer to Present Academic year disbursed of \$5500 in order to determine the total cumulative loan debt and to ensure that the student has not exceeded the maximum aggregate loan limit of \$31,000 for dependent students and \$57,500 for independent students of which no more than \$23,000 can be subsidized.

- Student's or Parents' Adjusted Gross Income (FNA012)
 - The Business Practices section should display the following:

- The institutions must run the FISAP banner job submission process first.

The student FAFSA information is imported into Banner for each student or parent on a yearly basis. The Student's or Parents Adjusted Gross Income is retrieved off of the banner form ROAFSAP. The institutions must run the FISAP banner job submission process first.

For independent students only the student's income is included in this value. For dependent students both the student's income and the parent's income are included.

- Father's Highest Grade (FNA014)
 - The Data Source section should display the following:
 - GUI Name: RNANAXX
 - GUI Label: Parent 1 on 'Plans and Educational Background' tab
- Mother's Highest Grade (FNA015)
 - The Data Source section should display the following:
 - GUI Name: RNANAXX
 - GUI Label: Parent 1 on 'Plans and Educational Background' tab

Testing successful? (circle one) Yes / No

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

Signature

Title

Appendix A: Document Change History

This section details the history of the document and updates made for each modification.

Release and Date	Form/Process	Page #	Update Description
August 25, 2023			Initial release of beta test plan.
October 3, 2023		6 - 8	Updated to include changes to PELL that were made after beta testing.

Appendix B: GCCG - SOAXREF Translation

Electronic Label *	Electronic Qualifier	Electronic Value *	EDI *	Web *	XML *	Banner Value	Description
RGTF AID	FSCH06	FGRNTD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NUFANS	Fdrl Sch - disbursed
RGTF AID	FSCH07	FGRNTD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NUPAS	Fdrl Sch - disbursed
RGTF AID	FWS	FWS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FWS	Fdrl Work-study - awarded
RGTF AID	GAHERO	STSCHD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GAHERO	State HERO Grant
RGTF AID	GAPSM	STSCHD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GAPSM	Inst Sch - disbursed
RGTF AID	***GCCG1	GCCG	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GCCG	Georgia College Completion Grant
RGTF AID	HOPEGD	HOPEGD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ZHPGE	State Sch - disbursed
RGTF AID	INSCH003	INSCHD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FAEAGE	Inst Scholarship - disbursed
RGTF AID	INSCH005	INSCHD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FAEBTR	Inst Scholarship - disbursed
RGTF AID	INSCH006	INSCHD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FAEJAC	Inst Sch - disbursed

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SAVE

The institutional fund code for the Georgia College Completion Grant must be translated to Regents Fund Code 'GCCG' on the Banner EDI Cross-Reference Rules (SOAXREF) page translation label 'RGTF AID'. If the institution fund code is 'GCCG', the translation still needs to be created.

For more information on translations, please see the Creating Translations for Data Collections business practice in the Data Collections section of the GeorgiaBEST Business Process website.