

Information Technology Services

University System of Georgia Information Technology Services
Enterprise Data Management & Analytics



Test Plan

Financial Aid Data Collection

(FADC) - 23/24 Aid Year

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Test Plan for Financial Aid 23-24

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

- Fund Code Maximum Award Amounts (Modified)
- Trend Report and Views (Modified)
- SBGI Field Length (Modified)
- Update VSID051 (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 Enterprise Data Management & Analytics 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/>

HOPE and PELL Maximum Award Amounts

Purpose

For the 2023 – 2024 aid year, the maximum HOPE Scholarship and HOPE Grant award per semester at a USG institution increased from \$4,620 to \$5,129. Based on this change, the maximum annual award for the HOPE, HOPECT and HOPEGD fund codes was increased to \$15,400.

The maximum annual award amount for Regents Fund Code ‘PELL’ was increased from \$10,500 to \$12,000 based on an increase for the 2023 – 2024 aid year.

Functionality delivered with this release:

In this release, the FADM Fund Code lookup table and the associated reference table will be updated for the following Regents Fund Codes and award amounts:

Fund Code	Description	New Max Award Amount
HOPE	HOPE Scholarship	15,400
HOPECT	HOPE Grants – Certificate / Diploma	15,400
HOPEGD	HOPE Grants – GED	15,400
PELL	Pell Grant	12,000

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 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 maximum award amount is 15,400 for the following Regents fund codes for HOPE:

- HOPE - HOPE Scholarship
- HOPECT - HOPE Grants – Certificate / Diploma
- HOPEGD - HOPE Grants

Testing successful? (circle one) Yes / No

Test Scenario 2:

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 \$15,400 for the applicable HOPE fund code.

Testing successful? (circle one) Yes / No

Test Scenario 3:

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 12,000 for the following Regents fund code:

- PELL – Pell Grant

Testing successful? (circle one) Yes / No

Test Scenario 4:

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 \$12,000 for the applicable Pell Grant.

Testing successful? (circle one) Yes / No

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

Signature

Title

FADC Trend Reports update

Purpose

For the 2023 – 2024 aid year, updates to FADC Trend Reports to ensure that data for the current and most recent past award years are displayed.

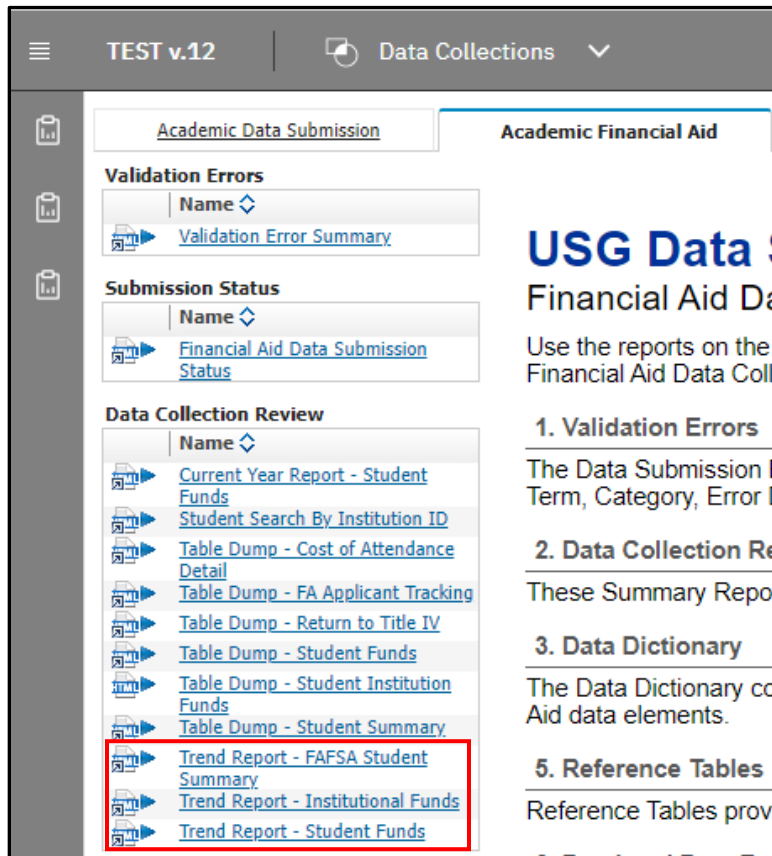
- Trend Report - FAFSA Student Summary
- Trend Report - Institutional Funds
- Trend Report - Student Funds

Test Scenarios:

Test Scenario 1:

Please go to Cognos TEST to verify that the three Trend Reports are displaying the current and most recent past award years. This is the link:

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



Please verify that the aid years now displaying are 23/24 and 22/23:

USG Data Store
Data Collection Review
Regents Funds Two Year Comparison

Institution		Total number of funds			Total number of fund codes with \$ amount > 0			Total \$ Amount			Average \$ Amount		
		23/24	22/23	Percent	23/24	22/23	Percent	23/24	22/23	Percent	23/24	22/23	Percent
ITS TEST UNIVERSITY	Total Regents Funds Accepted	64,812	78,167	-17.09%	50,167	57,200	-12.30%	228,175,346	253,151,217	-9.87%	4,548	4,426	2.77%
	Total Regents Funds Awarded	64,812	78,167	-17.09%	50,271	57,284	-12.24%	228,812,723	253,595,898	-9.77%	4,552	4,427	2.81%
	Total Regents Funds Paid	64,812	78,167	-17.09%	49,759	57,166	-12.96%	221,109,445	242,446,311	-8.80%	4,444	4,241	4.78%

Testing successful? (circle one) Yes / No

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

Signature

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SBGI Field Size

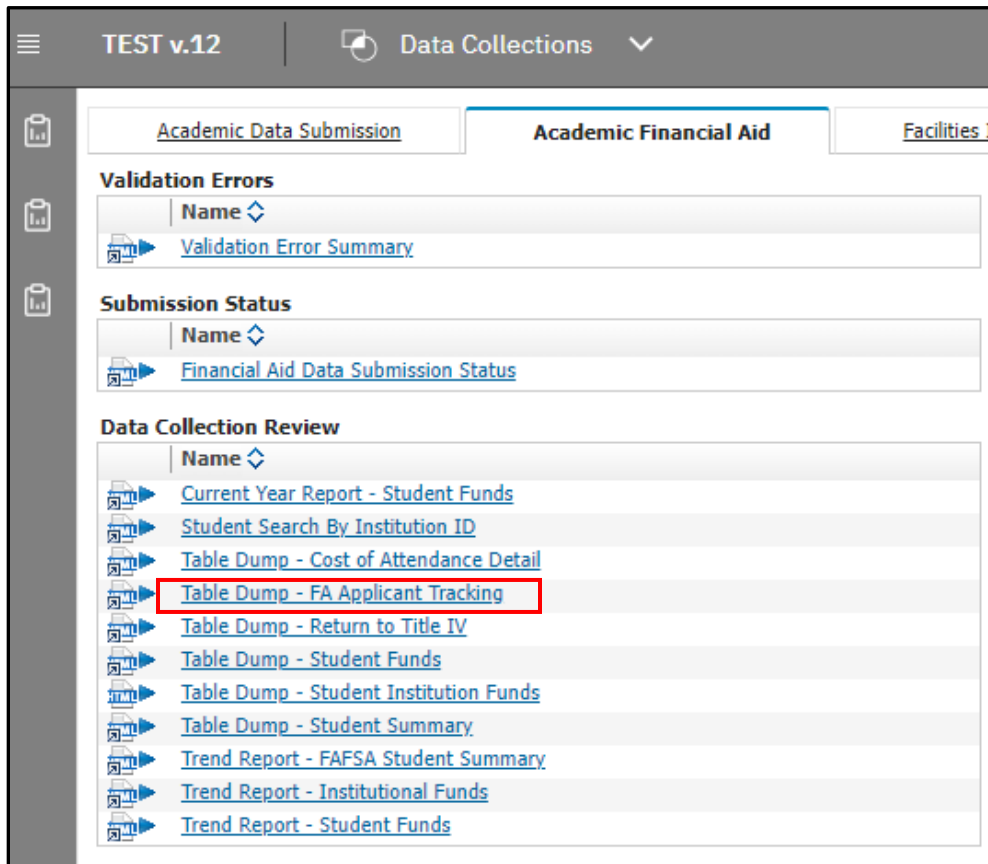
Purpose

To update the SBGI field size change from 6 to 20 characters for the FADC 2324 Aid Year. In Spring of 2023 Ellucian expanded the field size of the Source Background Institution Code (SBGI) codes from 6 to 20 characters. The length of FA Applicant Tracking SBGI CODE (RRRAREQ_SBGI_CODE) was increased to 20 characters in the Financial Aid DED. Thus, the entry for data element FNT018 was updated. The column SBGI_CODE was updated in the ODS and PDC FADM_FASFA_MIMIC tables and the related table dump reports.

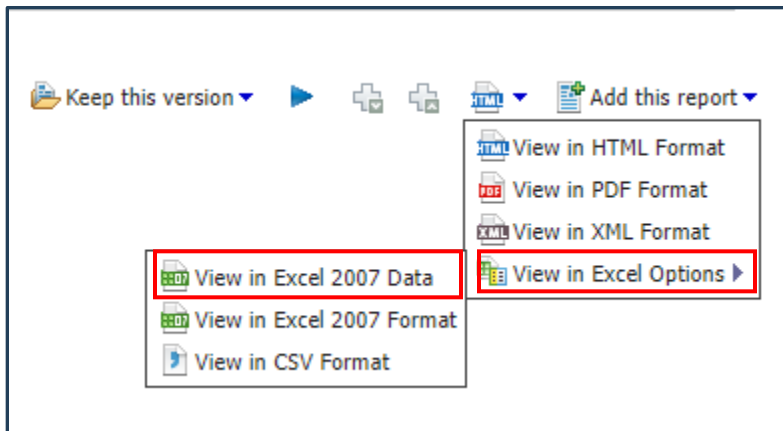
Test Scenarios:

Test Scenario 1:

Since the extract has already been run in APEX TEST for Financial Aid Trends Report, please log into Cognos TEST (<https://analyticst.ds.usg.edu/bi/>) and run the Table Dump for FA Applicant Tracking.



Download an excel copy of the Table Dump and sort by the SBGI_CODE Column. The expectation will be that the existing SBGI Codes will be collected and correct.



Testing successful? (circle one) Yes / No

Test Scenario 2:

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:

FA Applicant Tracking SBGI Code (FNT018)

- The Category section for (FNT018) should display the following:
 - Length: 20
- The Change History section for Academic_Term 2324 should display the following:
 - ACADEMIC_TERM: 2324
 - CHANGE_DATE: Oct 10, 2024
 - CHANGE_NOTES: Update character length from 6 to 20

Testing successful? (circle one) Yes / No

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

Update Validation VSID051

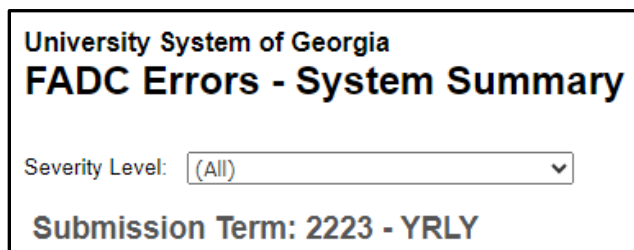
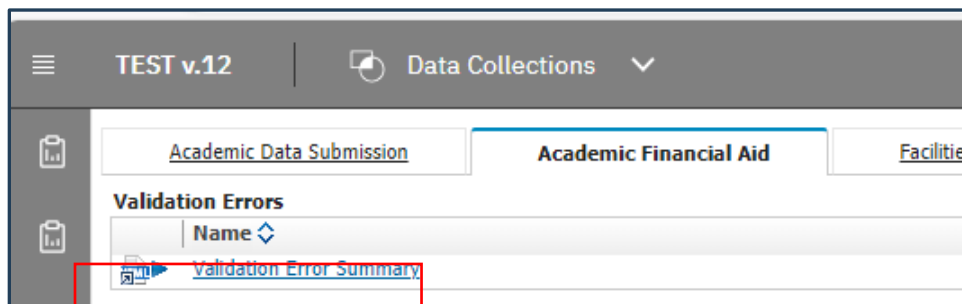
Purpose

Modification of VSID051 to correctly validate Regents Fund Codes STLND and STLNU will be included in the 2023 -2024 Financial Aid Data Collection. VSID051 - There must be at least one student per institution with an STLND or STLNU Fund Code.

Test Scenarios:


Test Scenario 1:

Log into Cognos TEST (<https://analyticst.ds.usg.edu/bi/>) and run the Validation Error Summary report.



The Validation did not fire since STLND is a valid code.

University System of Georgia
FADC Errors - Download Errors

Note: To download data, select the export icon above  then "View in Excel options".

Filter: Error Record Type = SUMMARY_ERROR
 Filter: Error Severity = E
 Filter: Business Rule Code = VSID051

Data Submission Errors for [REDACTED]

Submission Term: 2223 - YRLY

Business Rule Severity Descr	Category	Record Type	ODS Table	Business Rule	Primary Element	Attribute List	Attribute Content
Error			summary_error	(VSID051) There must be at least one student per institution with an STLND or STLNU Fund Code.	(FNA003) Fund Code	setid, award_year, regents_fund_code, reason	[REDACTED] 2223, REGENTS_FUND_CODE, Must have at least one student per institution with STLND or STLNU Fund Code.

Testing successful? (circle one) Yes / No

Test Scenario 2:

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:

- Fund Code (FNA003)

The Validation Rules section for (VSID051) should display the following:

- VSID051: There must be at least one student per institution with an STLND or STLNU Fund Code.

The Change History should display the following:

- ACADEMIC_TERM: 2324
- CHANGE_DATE: Oct 10, 2024
- CHANGE_NOTES: Modified VSID051 to correct the Regents Fund Code for Non-disbursed State Loans.

Testing successful? (circle one) Yes / No

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

Signature

Title