

**From:** [Chien Shih](#)  
**To:** [Rachel Tai](#); [Jerrick Woo](#); [Joe Lampo](#); [Martin Varela](#); [Henry Jung](#)  
**Cc:** [Bret Watson](#); [Nazy Galoyan](#)  
**Subject:** RE: check like aid year or not  
**Date:** Friday, August 30, 2013 12:34:00 PM

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Hi Rachel and all:

Thanks for Rachel’s detailed analysis, here is the recommendation I will make to the management regarding this issue, please take a final review, and we need to agree with how we are going forward with this:

Basically, we have to make a decision between the two options listed below:

	<b>Change the apply/unapply process (uncheck “like aid year”)</b>	<b>Do not Change the process (check “like aid year”)</b>
Explain	Let Banner do the apply/unapply from day 1 based on the priority rules we set up.	Past apply/unapply history frozen in time, Banner will do the cash payment apply based on the fiscal year rule
Pro	Installment plan will reflect the current balance student owed to school. No need to explain to students.	Installment plan will reflect the current balance student owed to school minus payment they made in current fiscal year terms. May create additional work load to explain to students why the installment balance is not matching the overall total balance owed.
Con	<ol style="list-style-type: none"> <li>1. May cause the past history abnormalities to surface because of the detail code setup issue.</li> <li>2. May cause Pell grant chargebacks to cause refund issues.</li> <li>3. May cause other undefined issues because of the apply/unapply will traverse all history transactions.</li> </ol>	<ol style="list-style-type: none"> <li>1. Explain to student of the installment plan.</li> <li>2. Past history and abnormalities frozen in time, may have to deal with it in the future.</li> </ol>
Risk	<p style="text-align: center;"><b>High</b></p> The change effect may be immediate, and we need to address the risk factors by deploying resources from multiple departments.	<p style="text-align: center;"><b>Low</b></p> The effect will not be immediate, we may spend resources initially to explain to students; but depends on the documentation and message announced to students, and the impact may be lessened in time.

As everyone agrees, this is not an easy choice, but we have to make this choice in order to go

forward, the installment plan itself is solid based on our team and students' testing, I do not think the team has fundamental disagreement in making the change decision or not, the driving factor should be what is the best way to move forward, and do we have enough time to ensure the best possible success for the entire project by making this change now. Based on this I recommend the following:

1. Do not change the apply/unapply process.
2. Continue to investigate and test the change option to see if we can make this change in winter quarter.

I need everyone's OK and support on this recommendation.

Thank you for your sacrifice of your holiday's time to support the success of this project.

Chien

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**From:** Rachel Tai  
**Sent:** Friday, August 30, 2013 9:36 AM  
**To:** Jerrick Woo; Joe Lampo; Martin Varela; Henry Jung  
**Cc:** Chien Shih; Bret Watson; Nazy Galoyan  
**Subject:** check like aid year or not

Hi Jerrick and all,

Unchecked like aid year will surface the -ve refund credit card payment issue, -ve Pell grant and missing transaction payment number. I checked the like aid year for some of the problem accounts this morning, and those accounts are all fixed by checking the like aid year.

The decision is hard. If uncheck the like aid year, we will need to "line-paid" to fix all the in-person refund account and the number count is enormous. Also, the -ve Pell grant chargeback needs to be fixed manually. The missing transaction paid number issue will be a headache for us to fix if we take out the like aid year.

In short,

Uncheck the like aid year - we need to deal with the new problem (-ve in person cc refund detail code) which is not an issue before, -ve Pell Grant and missing TP#. Also, we may have some undefined problem(s) in future.

Check the like aid year - Tn Payment Plan will not reflect the true current term balance. The growing of the pending list of unapply and apply is a real issue and we may not be able to fix the problem later on when the list grows into certain size.

Doesn't matter which way to go, I will need to discuss the -ve payment cc refund detail code with District Finance and see if we can have a charge detail code for in-person cc refund.

A few examples for the above issues are SID 20040968, 20011155, 20107367, 20089030 and 20006213.

Thanks.

Rachel  
x5308