

# Business Process Review Worksheet

## Foothill-De Anza CCD Educational Information System (EIS) Project

Thank you for agreeing to participate in our FHDA EIS BUSINESS PROCESS REVIEW forum. While the actual assessment activity will take place on-line via DecisionDirector, you might find it helpful to use this worksheet to preview our list of items and write your thoughts before you go on-line.

PLEASE NOTE: People often confuse "process" with "requirement". A process is something you do; but with no indication of how you do it. A requirement tells how you want that process to be accomplished. For example, evaluating an application for completeness can be done manually or automatically. The process is the same either way. Our requirement is to have that determination automated. We will deal with requirements in a separate forum.

In the on-line forum, you will be presented with a list of the primary FHDA BUSINESS PROCESSES. For each process that applies to you, we would like to know which of the following roles best describes your relationship to the function of the process:

\* PROCESS MANAGER, i.e. you oversee the function and you are responsible for process design and performance.  
Example: You are the Procurement Director, you are responsible to set up the purchasing policy and procedures.

\* ROUTINE USER, i.e. you work in or with this process on a daily or weekly basis;  
Example: You are the buyer who handles the actual procurement process.

\* OCCASIONAL USER, i.e. you work in or with this process on an occasional or irregular basis;  
Example: You are the department administrator who generates Purchasing Requisition document.

\* CUSTOMER, i.e. you receive the end product of the process (product or service).  
Example: You are the user who requests the purchase of the equipment or service

You can use this worksheet to note which is the case for each process. You may indicate more than one role for any given process.

We would then like you to evaluate the process in terms of the following metrics, each on a scale of Very Low (1) to Very High (5):

\* EFFICIENCY - End result achieved with minimum effort and training. Minimal rework, duplication of effort, and complexity.

\* AUTOMATION - The extent to which the process is automated.

\* RELIABILITY - The extent to which the end result of the process is predictable; process is stable, accessible, and produces valid results; the systems that support or automate this process are good.

\* SATISFACTION - The extent to which you are satisfied with the way this process \*currently\* works.

\* VALUE OF CHANGE - Improvements to the process will enable you to be more effective and productive. An investment of time and money to improve this process is justifiable.

Please feel free to add comments. If the process \*does not apply\* to you, please skip it and move on to the next. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.)

Questions about DecisionDirector? Contact Advantiv at 602.808.0618 x2 or support@advantiv.com.

## Area: Student Processes

### Section: Common

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

ROLE(S)   EFCY   AUTO   REL   SAT   VALU

464358   Bio/Demo Data -- Process of tracking general biographic and demographic data for all individuals (prospects, applicants, students, applicants, alumni, faculty, etc.)

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464359   Search -- Process of searching for individuals in the system.

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464360   Directory -- Process of establishing and using directories.

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		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464361	Residency -- Process of tracking residency data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464362	International Students -- Process of tracking international students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464363	Disabled Students -- Process of tracking/securing disability data and associated accommodation(s).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464364	Extracurricular Activities -- Process of tracking individual's extracurricular activities.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464365	Track Misc Data -- Process of tracking miscellaneous student data that may be used by various modules (legacy, veteran status, relationships, etc.).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464366	Communications -- Process of tracking all communications (letter, email, phone call, etc.) with an individual (incoming and outgoing)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464367	Event Management -- Process of setting up events and associated resources, inviting individuals and tracking attendance.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464368	Student Identification -- Process of tracking student identification data common to all modules.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464369	Track Committees -- Process of tracking committee data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464370	Track External Education Data -- Process of tracking external education data (e.g. school attended, dates of attendance, courses taken, gpa, etc.).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464371	Track External Organization Data -- Process of entering/maintaining external organization data (address, contact info, various identification codes, type of organization, school codes, etc.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464372	Duplicate Records // -- Process of deleting and correcting duplicate records.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464373	External Data Loads -- Process of loading various external data files.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464374	Imaging -- Process of accessing/linking imaged documents.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464375	District Wide Tracking -- Process of retrieving/combining/evaluating student information from both Foothill and De Anza (including student ID, course repeats, prerequisites, transcripts, counseling, restrictions, holds, etc.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464376	State Reporting -- Process of extracting and refining data for 320 reporting.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464377	Security -- Process for securing system and databases from unauthorized use and access.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Curriculum Development and Catalog Maintenance

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464378	Maintain Programs -- Process of maintaining, revising, and deleting program data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464379	Maintain Course History -- Process of maintaining a history of course information (all modifications of a course as changes occur).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464380	Course Setup/Maintenance // Load Calculations -- Process of loading factor tables to automate calculations based on hour fields.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464381	Course Setup/Maintenance // Pre-Req, Co-Req, Advisory Course Identification -- Process to identify courses that are Prerequisites, Corequisites and Advisories.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464382	Course Setup/Maintenance // Cross-Listed Courses -- Process of scheduling cross-listed courses.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464383	Course Setup/Maintenance // Cross-Listed Course -- Process to identify cross-listed courses.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464384	Course Setup/Maintenance // District Cross-Listing -- Process for creating and managing a District-level cross-listing of courses offered at Foothill and DeAnza.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464385	Course Setup/Maintenance // Course Numbering -- Process of setting up and assigning course numbers.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464386	Course Setup/Maintenance // CSU/IGETC -- Process to identify courses that fulfill the CSU/IGETC requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464387	Course Setup/Maintenance // FH/DA GE -- Process to identify courses that fulfill the FH/DA GE requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464388	Course Setup/Maintenance // Fulfillment -- Process to identify courses that fulfill a program (degree or certificate) of study (ie., Linguistics).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464389	Course Setup/Maintenance // Course Catalog -- Process of creating, maintaining, and tracking course catalog data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464390	Course Setup/Maintenance // Repeat Courses -- Process of identifying courses eligible to be repeated.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464391	Section/Course Planning -- Process of determining course demand and anticipated courses.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464392	Maintain Buildings Data -- Process of maintaining building data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464393	Maintain Rooms Data -- Process of maintaining room data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464394	Room Scheduling -- Process of scheduling rooms.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464395	Schedule Class Sections // General -- Process of scheduling classes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464396	Schedule Class Sections // Dates/Times -- Process of scheduling classes and specifying dates/times.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464397	Schedule Class Sections // Location -- Process of scheduling classes and specifying location(s).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464398	Schedule Class Sections // Method of Instruction -- Process of scheduling classes and specifying method of instructions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464399	Schedule Class Sections // Instructor Assignment -- Process of scheduling classes and assigning instructor.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464400	Schedule Class Sections // Credits -- Process of scheduling classes and defining credits.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464401	Schedule Class Sections // Enrollment -- Process of scheduling classes and defining enrollment limits.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464402	Schedule Class Sections // Restrictions -- Process of scheduling classes and defining restrictions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464403	Schedule Class Sections // Fees/Refunds -- Process of scheduling classes and defining fees and refunds.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464404	Schedule Class Sections // Notes -- Process of scheduling classes and associating notes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464405	Schedule Class Sections // Cancelled Classes -- Process of cancelling scheduled classes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464406	Schedule Class Sections // Final Exam -- Process of scheduling final exam for a class.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464407	Schedule Class Sections // Copy Sections -- Process of copying class schedule from term to term.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464408	Schedule Class Sections // Security -- Process of securing class schedule.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464409	Schedule Class Sections // Workflow -- Process of scheduling classes and defining workflow.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464410	Class/Grade Roster -- Process of generating class and grade rosters and positive attendance rosters.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464411	Attendance -- Process of tracking student attendance.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464412	Faculty Management // Faculty Attributes -- Process of tracking faculty attributes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464413	Faculty Management // Faculty Evaluations -- Process of tracking faculty evaluation data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464414	Faculty Management // Faculty Workload -- Process of calculating faculty workload.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464415	Faculty Management // Load Banking -- Process of tracking load banking.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464416	Faculty Management // General -- Process of tracking general faculty information.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464417	Faculty Management // District-Wide Load Tracking -- Process of tracking faculty load across District.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464418	Schedule Class Sections // Calendar -- Defining quarterly system calendars.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464419	Schedule Class Sections // Override -- Process overrides on hours/days/weeks.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464420	Schedule Class Sections // Hours -- Process of controlling individual and group hours for WSCH calculations.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464421	Schedule Class Sections // Schedule Updates -- Process of effecting updates from catalog to schedule.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464422	Schedule Class Sections // Pre-Req/Co-Req Set-Up -- Process of setting up section pre-requisites and co-requisites.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Financial Aid

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

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464423	Application -- Process by which demographics, pertinent student data are retrieved from the FAFSA for purposes of creating student record.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464424	Common Origination & Disbursement (COD) -- Process by which data is extracted and submitted via COD in conjunction with the Department of Education for processing of student records.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464425	Budgeting -- Process which categorizes cohort by predetermined groups. This process also aids in determining how student records can be packaged and/or awarded.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464426	Award // Set-Up -- Process for setting up parameters for awarding students either automatically or manually.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464427	Award // Packaging/Process Awards -- Process which determines the type and amount of funding a student will be offered and whether they accept the award online and subsequently receive the award.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464428	Award // Notification -- Online process by which students are notified by email of the award package for the year along with important messages and/or instructions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464429	Award // Requirements Tracking -- Process by which documents (required or optional) are tracked by student. This process also determines whether or not students have submitted the documentation and the status of submitted documentation (i.e. complete, incomplete, missing, waived).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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464430	Tracking/Notification -- Online process by which students are notified by email of the required documents being tracked and their status. (i.e. complete, incomplete, missing).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464431	Award // Reporting -- Process of generating data based on specific criteria for awarding students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464432	Verification -- Process by which selected student records are reviewed and verified as required by the Department of Education.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464433	Needs Analysis -- Process for determining the estimated educational cost for a student after calculating the cost of attendance and the family's expected family contribution. This process also affects the student's packaging/awarding process.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464434	Satisfactory Progress // Determination -- Process for determining student's academic progress and monitoring satisfactory progress on a term by term basis throughout history at institution.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464435	Satisfactory Progress // Time Frames -- Process for determining time frame and extended time frame based upon institutional definitions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464436	Satisfactory Progress // Notification -- Process for notifying students of their progress status and changes (online, email, letter etc.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464437	History // Create and Maintain Records -- Process by which records are created and maintained for students. This process allows the ability to update specific current year data based on prior year.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464438	History // NSLDS -- Process by which data is gathered to determined student's loan history to include but not limited to amounts, dates borrowed and institution attended when borrowed.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464439	History // Aggregate Awards - Process by which past aggregate awards are maintained in all funds.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464440	Process Loans // Counseling -- Process for counseling students on loan process, borrower rights and responsibilities, and repayment requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464441	Process Loans // Promissory Notes -- Process where students authorize the borrowing and disbursing of loan by e-signature.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464442	Process Loans // Origination -- Process where loan requests are initiated and submitted by institution to lender for disbursement.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464443	Process Loans // Corrections -- Process which allows for any corrections as related to loan amounts and disbursement dates.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Financial Aid

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464444	Process Loans // Disbursements -- Process in which the lender disburses funds to the school identified by student and amount. This process also allows for authorizing the disbursement of loans by check or into the student's personal bank account (EFT).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464445	Process Loans // Notification -- Process in which the institution is required to notify student of disbursement. This process also includes the notification of changes in student enrollment to department/agencies.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464446	Process Loans // Reconciliation -- Process for determining whether or not stated funds received have been accurately paid to students by check or directly deposited to their personal bank account.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464447	Scholarship -- Process in which students are identified for scholarships based on certain criteria.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464448	Funds Disbursement // Student Eligibility -- Process for determining student eligibility based on federal and institutional requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464449	Funds Disbursement // Year-Specific Rules -- Process setting parameters for budgeting, awarding and packaging processes based on current year updates/changes as defined by federal and institutional requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464450	Funds Disbursement // Fund Management -- Process for managing all funds offered, accepted, and awarded and disbursed to students. This process allows the administrator to track the level of funds that are available by type.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464451	Funds Disbursement // Interface With Other Systems -- Process for allowing for the ability to interface with other systems to aid in processes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464452	Funds Disbursement // Process Disbursements -- Process for the authorization of disbursing funds to students by check or direct deposit to their personal bank account (NOT TO STUDENT ACCOUNT).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464453	Funds Disbursement/ Process Disbursements -- Process to add individual student disbursement to batch or remove individual disbursements from batch (cancel).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464454	Funds Disbursement // Notification -- Process for notifying students when all aid funds have been paid to student. Also, process for notifying student when waiver of fees has been activated.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464455	Funds Waived -- Process to link fee waiver award to waiver of fees based on student enrollment.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464456	Funds Disbursement // Reporting -- Process for producing funds disbursement reports.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Financial Aid

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464457	Student Employment // Award and Tracking -- Process to manage federal work-study awarding, tracking hours worked, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464458	Student Employment // Placement Tracking -- Process by which work-study students are tracked for placement into positions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464459	Reporting // Standard and Audit Reports -- Process which facilitates standard Financial Aid reporting such as FISAP and MIS.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464460	Reporting // General -- Process which allows for aid in ad hoc and other Financial Aid reporting tasks.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464461	Enrollment Reporting // Clearinghouse -- Process to send enrollment information to Clearinghouse.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464462	Communication -- Process of identifying ad hoc subgroups of students for email communication or other electronic communication (through portal) and sending group messages.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Student Registration

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464463	Registration Date and Time -- Process of assigning date and time to register, and establishing priorities.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464464	Prerequisites/Corequisites // Processing -- Process of clearing students of their prerequisites/corequisites.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464465	Registration // Appointments -- Process of assigning appointments, and establishing priorities.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464466	Registration // Enrollment Limits -- Process of defining enrollment limits district wide.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464467	Registration // Block Registration -- Process of defining student and/or course blocks or groups.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Student Registration

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464468	Registration // Enrollment Limits -- Process of defining enrollment limits.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464469	Registration // Overrides -- Process of overriding enrollment restrictions, e.g. Unit Load Override	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464470	Registration // Permissions -- Process of defining registration permission.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464471	Registration // Permissions/High School -- Process of defining and administering course/registration block and release for high school students, i.e. permission form.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464472	Registration // Restrict Enrollment -- Process of restricting enrollment.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464473	Registration // Holds -- Process of placing/releasing registration holds on students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464474	Registration // Search -- Process of searching for class sections.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464475	Registration // Time Conflicts -- Process of identifying and resolving time conflicts.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464476	Registration // Student Registration -- Process of student registration for classes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464477	Registration // Credit by Exam -- Process of registering credit by exam "courses" (De Anza only)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464478	Registration // Prerequisite Checking -- Process of identifying and searching for prerequisites in student record.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464479	Registration // Course Repetition -- Process of checking student record for course completion, and repetition rules for that course.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464480	Registration // Educational Plan -- Process of automated registration from student educational plan per term.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464481	Registration // Waitlist -- Process of creating, tracking, and administering waitlists.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464482	Registration // Add/Drop -- Process of adding/dropping courses. Includes obtaining and process all necessary authorizations, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464483	Registration // Add/Drop // Non-Payment -- Process of dropping students from courses for non-payment.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Student Registration

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464484	Registration // Census-- Process of dropping students within Census Period.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464485	Cohort Enrollment Tracking -- Process of monitoring enrollment for cohorts (Athletes, VA, International).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464486	Track Student Data -- Process of tracking student data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464487	Registration // Projection -- Project future section needs based on current term enrollment.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Grades

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464488	Grades/Grading // Define Grades -- Process of defining grades.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464489	Grades/Grading // Calculation -- Process of calculating grades.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464490	Grades/Grading // Grade Entry -- Process of entering/posting student grades.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464491	Grades/Grading // Incompletes -- Process of entering, monitoring, and assigning default grades for Incompletes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464492	Grades/Grading // Grade Changes -- Process of changing grades.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Records/Transcripts

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464493	Enrollment // Verification -- Process of receiving and processing enrollment and degree verification requests.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464494	Enrollment // Reporting/Clearinghouse -- Process to send enrollment information to Clearinghouse.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464495	Transcript // Posting Degrees -- Process of posting degrees and certificates.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464496	Transcript // Posting Academic Standing -- Process of posting academic standing.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464497	Transcript // Posting Honors or Distinction -- Process of posting Honors and other special programs/distinctions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464498	Transcript // Fees -- Process of assessing, tracking, and collecting transcript fees.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464499	Transcript // Electronic Transcripts -- Process of receiving/sending electronic transcripts.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464500	Transcript // Non-Electronic Transcripts -- Process of receiving/sending hard copy transcripts.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464501	Transcript // Holds -- Process of placing/releasing transcript holds.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464502	Transcript // Printing -- Process of printing transcripts.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464503	Transcript // Requests / Of Others -- Process of generating, transmitting, and tracking transcript requests from the District to other institutions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464504	Transcript // Requests / From Others -- Process of receiving, tracking, and servicing transcript requests from other institutions, persons, and entities.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464505	Transcript // Content Tracking -- Process of tracking transcript content.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464506	Transcript // District-Wide Courses -- Process for tracking District wide courses.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464507	Transcript // Imaging -- Process of imaging and uploading other transcripts into student record.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464508	Transfer Credit // Set-Up -- Process of setting up transfer credit equivalency rules.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Records/Transcripts

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464509	Transfer Credit // Administration -- Process of evaluating, entering, and restricting transfer credit.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464510	Transfer Credit // Credit by Exam -- Process of posting Credit by Exam to record.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464511	Transfer Credit // GE, IGETC Completion -- Process of posting GE/IGETC completion on transcript.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464512	Transfer Credit // Test Credit -- Process of processing test credit data (DD214, AP Courses (by test tape), et cetera)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464513	Graduation -- Process of graduating students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464514	Graduation Application -- Process of accepting and inputting graduation application.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464515	Degree Evaluation -- Process of running Degree Audit, reviewing student records, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464516	Degree Award // Posting-- Process of awarding degree and posting to record.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464517	Degree Award // Communications -- Process of notifying students of degree status, award, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464518	Degree Award // Data Collection -- Process of collecting degree/certificate awards data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464519	Transfer Credit // Data Collection -- Process of collecting transfer data (incoming transcripts).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464520	Honors -- Process of calculating/assigning student honors.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Nontraditional Student Programs

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464521	Nontraditional Student Application -- Process of collecting application information for nontraditional students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464522	Nontraditional Student Registration -- Process of registering students without creating official transcript.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464523	Nontraditional Student Record -- Process of creating a record, if necessary, separate from official transcript.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464524	Nontraditional Student Accounts -- Process of collecting fees for nontraditional courses.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464525	Nontraditional Students -- Process of tracking/maintaining nontraditional student data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464526	FERPA -- Process of tracking FERPA data for students.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464527	Enrollment Verification -- Process of requesting/generating enrollment verification requests.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464528	Reporting -- Process of generating federal mandated reports.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Advising

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464529	General -- Process of tracking advising data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464530	Track Advisee Data -- Process of tracking advisee data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464531	Schedule Advising Appointment -- Process of scheduling advising appointments.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464532	Track Matriculation Data -- Process of tracking new student who have or have not completed matriculation	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Advising

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464533	Intervention -- Process of identifying at risk students (Early Alert) and Assessment levels.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464534	Intervention Follow Up -- Process of linking and tracking Early Alert students to services and monitoring success.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464535	Communication -- Process of reminding students about advising appt, incomplete matriculation requirements, academic standing, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464536	Tracking Contact Hours -- Process of tracking contact info for state reporting/funding.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464537	Data for Cohorts -- Process of collecting data for specific cohorts (summer bridge, athletes, etc.).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464538	Academic Rank -- Process of calculating and tracking student academic rank.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464539	Academic Standing // Assignment -- Process of assigning and tracking student academic standing.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464540	Academic Standing // Data -- Process of collecting aggregate and individual student academic standing data.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Degree Audit

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464541	Define/Maintain Requirements -- Process of setting up degree requirements.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464542	Generate Degree Audit -- Process of running degree audit.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464543	Waivers/Overrides/Substitutions -- Process of entering/tracking waivers, overrides and substitutions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464544	Articulation -- Process of reviewing course equivalencies from other colleges.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Degree Audit

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464545	Degree Audit/Equivalencies -- Process of creating, maintaining equivalency tables (multi-levels).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464546	Data -- Process of requesting/reviewing data to identify students near degree/cert completion or eligibility for multiple awards.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Student Accounts

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464547	Tuition/Fee Calc and Assessment // Set Up -- Process by which parameters are set to apply to charges student's accounts as related to tuition & fees, and other charges/fees as defined by Ed Code, Title 5 and the college policies/procedures.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464548	Tuition/Fee Calc and Assessment // Charges -- Process by which charges are applied to student's accounts as related to tuition & fees, and other charges/fees as defined by Ed code, Title 5 and the college policies/procedures.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464549	Tuition/Fee Calc and Assessment // Deferments/Waivers -- Process by which charges are deferred or waived based on pre-defined circumstances as prescribed and allowed by Ed code, Title 5 and the college board's authorization.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464550	Tuition/Fee Calc and Assessment // Revenue -- Process to determine dollar amount associated with tuition and fees.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464551	Billing // Set Up -- Process of defining rules for processing statement of charges.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464552	Billing // Design Billing Statements -- Process by which layout of bill is defined. This includes detail of bill data such charges, payments, notification messages, and course load summary.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464553	Billing // Print/Distribute Billing Statements -- Process by which determining method of distribution of billing statements via paper or electronically. This also includes defining and identifying cohort for specific billing purposes.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Student Accounts

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464554	Billing // Third Party -- Process by which customers are identified and payments tracked by their contributing agencies. This process also allows for billing and other communications with contributing third party agencies.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464555	Cashiering // Cash Drawer -- Method for maintaining monies collected on daily basis.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464556	Cashiering // Interface with Other Systems -- Process by which cashiering function may be able to integrate with third party software for front end processing.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464557	Cashiering // Payments -- Process by which methods of payment are accepted. This process can be via web-based, in person, lockbox, and/or ACH. This process also includes managing types of payment that are accepted.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464558	Cashiering // Receipts -- Process by which proof of payment is provided to student or customer. Receipting also provides an audit trail for the ability to track payments.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464559	Cashiering // Cashiering Reporting -- Process by which one is provided with daily and/or monthly transactions of cashiering sessions by individuals, shift, payment types, etc. This function also allows for tracking the history of cashiering sessions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464560	Maintain Receivables // Installment Payments -- Process by which students are allowed to promise of payment via an installment plan. This process efficiently and effectively tracks payment due dates, interest rates, and plan fees as applicable.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464561	Maintain Receivables // Apply Payments -- Process that applies payments to students or customer accounts. Once payments have been posted to the students account (payments can include financial and/or payments made directly by the student), this process is executed to feed application of payments to the general ledger.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464562	Maintain Receivables // Loan Handling -- Process manages loan programs offered by an institution. More specifically this includes emergency loan programs offered to students. This process also allows for the ability to successfully reconcile loan portfolios whether institutional or federal.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464563	Maintain Receivables // Insufficient Fund Checks/Credit Card Charges -- Process which identifies customers presenting insufficient funds to the college. This process also allows the ability to determine the number of times insufficient funds have been presented, thereby presenting the opportunity to define procedures that	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Student Accounts

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464564	Maintain Receivables / Holds -- Process by which certain cohorts (customers with outstanding receivables) are identified and restricted from executing college university business which includes but not limited to registration for upcoming session, cancellation of classes, termination of classes and/or other registration services.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464565	Refunds // Refunding Rules -- Process by which parameters are set up to allow for refunds whether is caused from withdrawals or payments received in excess of total charges	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464566	Refunds // Issue Refunds -- Process which identifies students/customers who are eligible to receive a refund. This process also allows for refunds to be received via paper check, ACH (direct deposit, re-loadable debit card).	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464567	Collections -- Process by which outstanding accounts receivables are identified, tracked, and placed with the in-house or third party collections department/agency.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464568	Education Tax Credits -- Process for producing and reissuing 1098T's.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464569	Interface -- Process which allows for various interaction with targeted offices and external audit software.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464570	Petty Cash -- Process of requesting, disbursing, and tracking petty cash.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section: Self-Service

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464571	Student Self-Service // Student Records -- Self-Service processes available to students regarding Student Records data. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Self-Service

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		<u>ROLE(S)</u>	<u>EFCY</u>	<u>AUTO</u>	<u>REL</u>	<u>SAT</u>	<u>VALU</u>
464572	Student Self-Service // Financial Aid -- Self-Service processes available to students regarding Financial Aid tracking and awards and disbursements. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464573	Student Self-Service // Advising/Degree Audit -- Self-Service processes available to students regarding advising and degree audit functions and data, including degree audits and transfer credit/FHDA requirements review. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464574	Student Self-Service // Student Accounts -- Self-Service processes enabling students to handle all transactions electronically. This includes transactions such as paying via the web, receiving refunds via ACH, submission of any needed/required document electronically, etc.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464575	Prospect Self-Service -- Self-Service processes available to prospects. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464576	Applicant Self-Service -- Self-Service processes available to applicants. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464577	Recruiter Self-Service -- Self-Service processes available to recruiters. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464578	Faculty Self-Service -- Self-Service processes available to faculty. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464579	Advisor Self-Service -- Self-Service processes available to advisors. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
464580	Visitor Self-Service -- Self-Service processes available to visitors. (Self-service processes typically replace or augment processes or activities that otherwise would have been non-existent or facilitated by a District employee.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

## Area: Student Processes

### Section: Self-Service

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ROLE(S)   EFCY   AUTO   REL   SAT   VALU