1

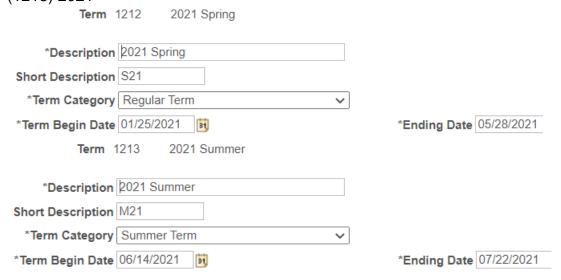
FA Processing 5-3-2021

Attendees: Roderick, Hemanth, Richard, Marla

Discussion Points:

The purpose of this meeting is to discuss the FA processing requirements going forward through the Fall term of 2021

1. Objective - Maintain and continue FA processing for Spring (1212) and Summer (1213) 2021



List concerns/requirements for the remaining Spring and Summer terms for 2020 such as summer awarding/packaging, Pell and Loan processing, communications, support for colleges

Objective – Load 21/22 ISIRs in PRD and begin verification for the Fall term 2021 (1214), correct ISIRs and send corrections to CPS

2021 Fall



- Strategy Confirm Table setup (including the Aid Year <u>Rollover</u>) be completed in UAT and then migrated to PRD? This will include the checklists and aid year specific comments along with updates to the RTF letter templates and queries
- 4. We need PUM 20 applied to PRD that was released on 2/10/21. This is required to load 21/22 ISIRs and call the INAS calc and set ISIR home campus. Discuss what it's going to take to get PUM applied to PRD. Is PUM 20 in UAT now?
- 5. Access to FABATCH Need provisioning to sign in as FABATCH to see run controls
- 6. Make sure No refresh of UAT
- 7. Need processing dates and COA budgets from colleges Produce 'Date Matrix' Excel worksheet highlighting key dates. Also, we need the college budgets
- 8. Review the summary of information requests to College FA Directors/Officers release by Eugene
- 9. Cal ISIR (Dreamer) setup/testing
- 10. Where are letter templates saved?
- 11. Packaging Plans consist of Fall Only, Fall Spring, Summer Only and Spring Only. Confirm Only Pell and SEOG are auto packaged for Fall and Spring. Just Pell for Summer? Discuss other awarding such as loans and work study. Are these awarded manually by the colleges? Discuss use of Packaging Variables BOG variables Customizations for Cal Grant, Promise Grant
- 12. Need 'Communication Matrix' to know what communications are sent when
- 13. Why does BCC have a 2nd school code for NSLDS use?
- 14. Summer 2020 and before was non-standard. Summer 2021 and 2022 is set as academic Why the change?
- 15. Shopping Sheet Update Logos
- 16. Uploading in the OCI Eugene emailed to mention: Use Unix which is case sensitive (Teresa is up on this) There was a plan to work on some views which might make query easier

FA Processing 5-5-21

Discussion Topics:

- 1. We need to get the first AY22 ISIR file from each college for testing the ISIR Load process. Who can do this and where will the files be placed?
- 2. Dick to set up the ISIR Global Options to Call INAS
- 3. Then we need to test loading the ISIRs in UAT
- 4. Status of new year checklists Roderick has added the 80 F22 checklists to UAT What is the game plan to replace the 2020-21 in the descriptions with 2021-22?
- 5. Dick will set up the Checklist Items, Function Table, 3C Groups and 3C Event Definitions and Run Controls
- 6. Roderick will set up the Jobs to assign the checklists
- 7. Roderick will determine what's needed to test the Campus Logic file
- 8. Hemanth has been requested to sequence the active Com Gen jobs with emphasis on those supporting ISIR loads, checklists, and verification. This will let us know what letter templates to update and test first
- 9. Discuss Marla's request regarding: Urgent Issue FAO Reconciliation Errors
- 10. Discuss tomorrows FA Director's Meeting See the Topic Status for the NEW Year Setup below:

5-6-21

FA Director's Meeting

Topic Status:

1. New Year Set-up

Where are we with this process?

- The core setup is currently being established in the test database (UAT User Acceptance Testing).
- UAT has the latest system software updates applied (PUM 20)
- The top priority is the setup to support ISIR loads, checklist assignment and related communications to begin the verification process with Campus Logic

What information do you need from the colleges to complete this process?

The Cost of Attendance budgets and certain key dates have been requested

What is the timeline to get this set-up?

The best case is the week of May 17th to begin loading ISIRs

1. SAP run 3. CCPG Waivers (2021-2022) 4. Award Automation

FA Processing 5-6-21

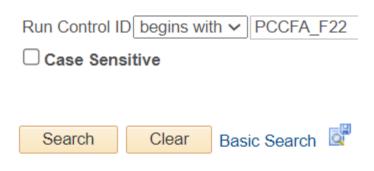
Discussion Topics:

- 1. All 80 2021-22 Checklist Items (F22) and related descriptions/comments have been setup in UAT Migration to PRD has been requested
- 2. Next:
 - a. Add the 80 F22 checklists to the Checklist Function table Migration to PRD has been requested
 - b. Build the Checklist table for the 80 F22 checklists Migration to PRD has been requested
 - c. Setup the 3C Groups for the 80 F22 checklists Migration to PRD has been requested
 - d. Build 160 Event Definitions required to 'assign' and 'complete' the F22 checklist codes Richard
 - e. Setup the Event 3C Groups for the Event Definitions Richard
 - f. Setup the 160 3C Engine run controls Richard
 - g. Setup Jobs to assign and complete the checklist codes Roderick
- 3. Identify and update the initial communication templates
 - a. FAFSA Thank You Even
 - b. Financial Aid Award Email Even
- **4.** Discuss Cal ISIRs, Campus Logic, ISIR home Campus process (in what order is this run?)
- 5. Run control strategy Our jobs are built to run many processes. For example, one JobSet contains:
 - ISIR Home Campus
 - ISIR Inbound
 - Check List Assignment
 - ATB
 - NSLDS
 - Edit Messages
 - Mass Email and Campus letters

This is fine when everything is tested and up and running. But, it's too much when we begin live processing for the new aid year. I recommend the jobs are run individually to allow for review of the processing results.

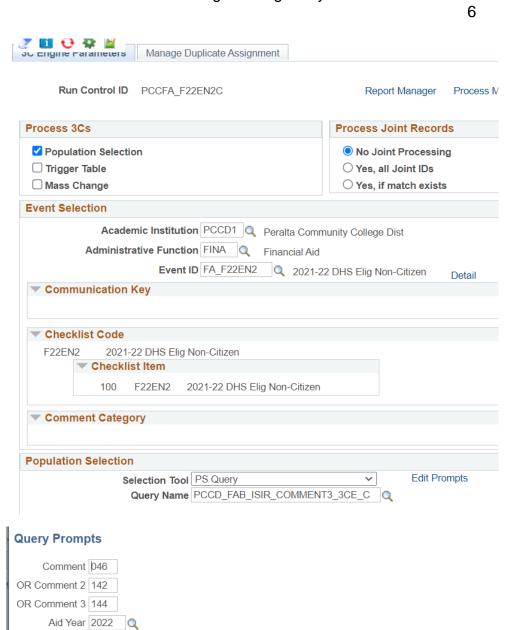
FA Processing 5-10-21

As shown below in 2. d. & e. the Event Definitions and Event 3C Groups have been completed in UAT.



Search Results

View 100 First	1-23 of 23 🕟 Last
Run Control ID	Language Code
PCCFA_F22115	English
PCCFA_F22115C	English
PCCFA_F22116	English
PCCFA_F22116C	English
PCCFA_F22132	English
PCCFA_F22132C	English
PCCFA_F22133	English
PCCFA_F22133C	English
PCCFA_F22138	English
PCCFA_F22138C	English
PCCFA_F22146	English
PCCFA_F22146C	English
PCCFA_F22400	English
PCCFA_F22400C	English
PCCFA_F22401	English
PCCFA_F22DC1	English
PCCFA_F22DC1C	English
PCCFA_F22DC2	English
PCCFA_F22DC2C	English
PCCFA_F22EN1	English
PCCFA_F22EN1C	English
PCCFA_F22EN2	English
PCCFA_F22EN2C	English



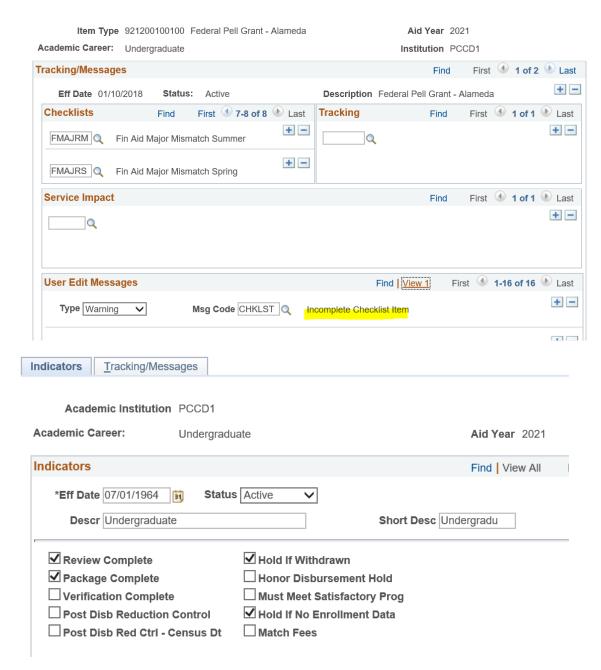
Roderick – Do you have a way to establish the PCCFA_22 Run Controls in UAT – Similar to how the Event Definitions were created?

Discuss if checklists prevent disbursement – Review User Edit Messages, Disbursement Rules – Global and Item Type:

Checklist F22EN2

OK

7



- 6. All 80 2021-22 Checklist Items (F22) and related descriptions/comments have been setup in UAT Migration to PRD has been requested
- Next:
 - a. Add the 80 F22 checklists to the Checklist Function table Migration to PRD has been requested
 - b. Build the Checklist table for the 80 F22 checklists Migration to PRD has been requested

- c. Setup the 3C Groups for the 80 F22 checklists Migration to PRD has been requested
- d. Build 156 Event Definitions required to 'assign' and 'complete' the F22 checklist codes Richard
- e. Setup the Event 3C Groups for the Event Definitions Richard
- f. Setup the 156 3C Engine run controls Richard
- g. Setup Jobs to assign and complete the checklist codes Roderick
- 8. Identify and update the initial communication templates
 - a. FAFSA Thank You Even
 - b. Financial Aid Award Email Even
- **9.** Discuss Cal ISIRs, Campus Logic, ISIR home Campus process (in what order is this run?)
- 10. Run control strategy Our jobs are built to run many processes. For example, one JobSet contains:
 - ISIR Home Campus
 - ISIR Inbound
 - Check List Assignment
 - ATB
 - NSLDS
 - Edit Messages
 - Mass Email and Campus letters

This is fine when everything is tested and up and running. But, it's too much when we begin live processing for the new aid year. I recommend the jobs are run individually to allow for review of the processing results.

FA Processing 5-11-21

- 1. Testing for PUM 20 To be complete Friday
- 2. FA COA budgets
- 3. Discuss when the Override ISIR Home Campus process runs and how it works
- 4. Discuss the requirements for Campus Logic
- 5. Discuss what has to be done to load CAL ISIRs
- 6. Discuss if checklists prevent disbursement Review User Edit Messages, Disbursement Rules Global and Item Type
- 7. Complete setup of 3C Engine run controls and setup of Jobs

FA Processing 5-12-21

- 8. Goal Get the setup done/tested in UAT and migrate to PRD so we can load ISIRs, assign checklists and send welcome email
- 9. Recommended contact in colleges for questions on budgets and dates

9

- 10. Discuss the requirements for Campus Logic
- 11. Discuss what has to be done to load CAL ISIRs
- 12. Discuss if checklists prevent disbursement Review User Edit Messages, Disbursement Rules Global and Item Type Review Abigail's response

This is the answer Abigail provided:

"Packaging rules and individual item type set up prevent disbursement from happening if incomplete checklists exist."

Here is Eugene's response:

"I think 105cl is the main checklist now. We do have other checklist items. But disbursement rules as Abigail has mentioned."

Steps for FA to test in UAT

- Complete the setup of checklists, 3C Engine and Jobs to assign/complete F22 checklists
- Question Are their non-F22 checklists auto assigned?
- 3. Complete the Aid Year Rollover This should include new aid year disbursement dates and budget amounts
- 4. Confirm there are 21/22 ISIRs in UAT 'Unprocessed' There are not any 21/22 ISIRs in the UAT staging tables We need to import them
- 5. In UAT only, (because PUM 20 is applied) set the Global Options and ISIR Data Load Parms to call INAS This will test PUM 20
- 6. For now, do we have to load ISIRs into the staging tables? Looks like the campuses run the 1st step to load ISIRs into the staging tables: Nav: Financial Aid > File Management > Import Federal Data Files > FA Inbound
- 7. Run ISIR Home Campus Mod
- 8. Run 2nd ISIR load step: This is run 4x to load the ISIRs. Nav: Financial Aid > File Management > ISIR Import > Process ISIRs > ISIR File Load. Run controls are FA_ISIR_LOAD_LC, BCC, COA and MC
- 9. Run 3C Engine processes to initiate/complete F22 checklists Here we can run a single Job with all the PCCFAF22 checklists
- 10. Run ATB
- 11. Process NSLDS Data Push. Nav: Financial Aid > File Management > NSLDS > Update Aggregates with NSLDS > NSLDS Data Push
- 12. Load Cal ISIRs

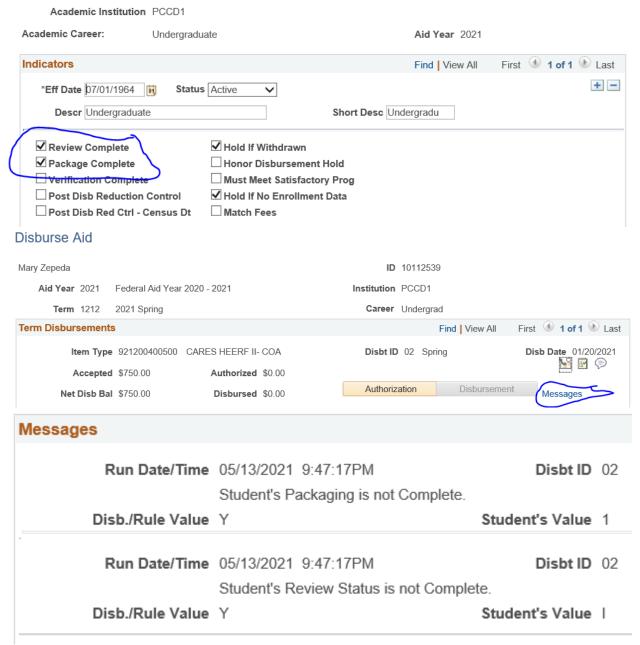
FA Processing 5-14-21

Discussion Topics:

1. Review the HEERF Funding Disbursement

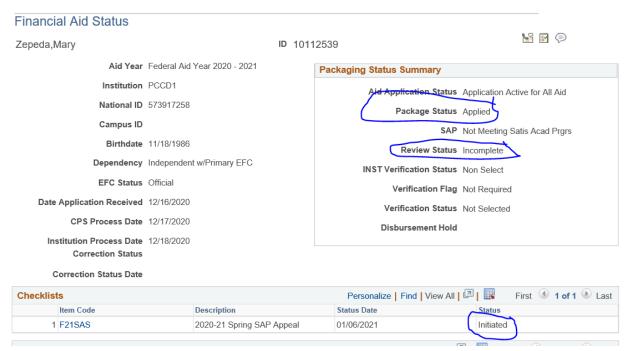
Here it what I see at first glance:

10112539 and others I checked all failed authorization because the Global Disbursement Rules prevent disbursement if the student's Review Status in not Complete and the student's Packaging is not Complete as shown below:



So, this is likely the reason all the students did not get disbursed. Disbursement could be processed with 'Override' but this is not recommended. Let's talk tomorrow about current practices to mark the Student's Review Status as Complete. The status is generally not marked as complete if the student has an open checklist - Which this student has with an initiated SAP Appeal checklist as shown below:

11



Thanks, Richard

2. Home Campus process – Initial results

Process

Instance: 6691347 Type: Application Engine Name: PCC ISIRCMPS Description: Override ISIR Home Campus Q View All Severity Log Time Message Text **Explain** Explain (0,0)7:23:26AM Total Number of ISIR Load Files processed: 0 (0,0) Explain 7:23:26AM Total Number of Campus Corrections on ISIRs: 0 (0,0) Explain 7:23:26AM Published message with ID faae6a1c-b4bf-11eb-9861-Explain 7:23:40AM d3b09cbb0867 to create entry in folder HRMS. Successfully posted generated files to the report repository **Explain** 7:23:40AM

3. Have Pell Grant schedules for 2021-2022 been loaded?

Schools must import the Department of Education's published Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules directly into your system to evaluate Pell awards.

Use the Pell Table Load page to import Federal Pell Grant schedules as MS Excel files.



Obtain the Department of Education's published Pell Payment and Disbursement Schedule for the aid year from the IFAP website (https://ifap.ed.gov/ifap/). Only MS Excel (*.xlsx) versions of the schedule can be loaded; PDF or other formats are not supported.

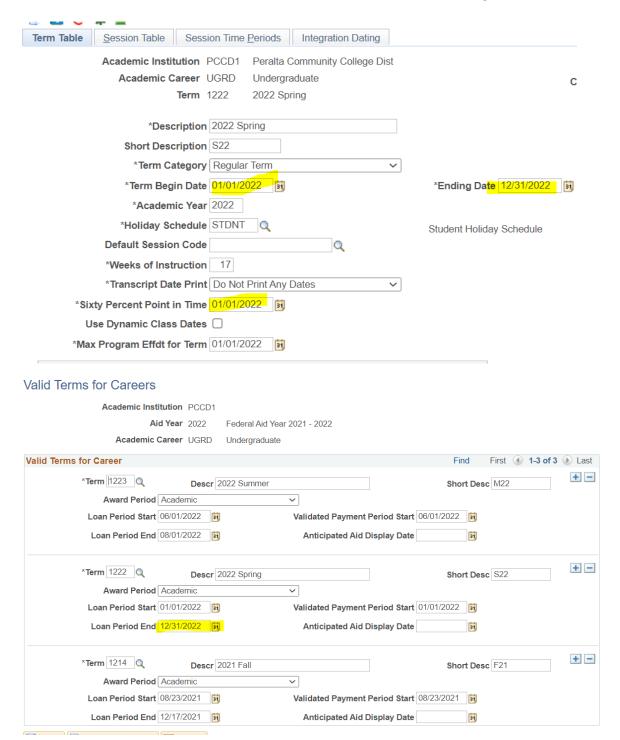
Note that there is a 64-character limit for the attachment file name, so you may need to rename the file you download from IFAP.

FA Processing 5-17-21

Discussion Topics:

- 1. ISIR load process fails to read any records Msg says: Multiple School Code Exists. Roderick has filed a ticket with Oracle. This is important as it's in our critical path to go live for the new aid year
- 2. Success with Aid Year Rollover
- 3. Success with loading ISIRs manually
- 4. Success with building FA Terms manually
- 5. Success with building budgets manually
- 6. Problem with Student Records Term/Session table setup Dates need review

13



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Richard Davis

Thu 5/13/2021 8:09 PM

To: Amany ElMasry; Silvia Cortez

Cc: Amanda Lim; Hemanth Kumar; Marla Williams-Powell

Bcc: Richard Davis

Hi Amany and Silvia,

This question is in regard to the Term Begin Date and the Ending Date on the Term/Session Table for terms 2014, 1222 and 1223 which represent the new Financial Aid year 2022.

It's my understanding the start date should correspond to the first day of instruction for the term and the end date should correspond to the last day of instruction for the term. The dates are also used in Financial Aid processing to calculate the loan period start and end dates.

That said, I'm asking if you would review the existing setup in PRD with particular attention to the Spring 2022 term 1222 that has a start date of 01/01/2022 and end date of 12/31/2022 - Thank you, Richard

- Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD
- 8. Request to Teresa for access in PRD Create Group Data Entries
- 9. Upcoming request to Roderick to load the Pell Grant schedules for 2021-2022
- 10. Upcoming Testing Comm Gen for Welcome email, need to test the Cal Grant mod, give approval to apply PUM20 in PRD

FA Processing 5-18-21

Fa Process Testing in UAT

- 1. Success with Aid Year Rollover
- ISIRs were imported into staging tables for all 4 colleges and the Home Campus Mod was run
- 3. ISIRs have been loaded for all 4 colleges 280 loaded and 133 suspended
- 4. 211 F22 checklists assigned using Job PCCFA3Cs
- 5. Success with building FA Terms manually and in batch
- 6. Success with building budgets manually and in batch
- 7. Need to have college FA Staff confirm budgets Schedule Teams Mtg
- 8. Student Records Term/Session table setup Dates updated by Armany for the 3 terms in aid year 22 in PRD and UAT Done
- Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD
- 10. Request to Teresa for access in PRD Create Group Data Entries Has been approved by Adil
- 11. Request to Roderick to load the Pell Grant schedules for 2021-2022

- 12. Upcoming Testing Com Gen for Welcome email, need to test the Cal Grant mod, give approval to apply PUM20 in PRD
- 13. Test additional ISIR loads and checklist assignments Make sure Responsible ID is correct in Personal Checklist record for F22115, 132, 146
- 14. Today:
 - a. Test process to assign letter codes
 - b. Test Com Gen process to produce email
 - c. Review setup for ATB, NSLDS and Edit Message
 - d. Set up meeting with Jonathan Olkowski

FA Processing 5-19-21

Discussion Topics:

Fa Process Testing in UAT

- 1. FA gives its approval to apply PUM20 to PRD. No errors have been experienced during testing in UAT. The INAS calculation process is working as expected
- 2. Upcoming request to migrate Budgets and Disbursement Dates to DEV for testing, then to PRD. Please migrate to DEV now for testing the migration
- 3. Request to Teresa for access in UAT, DEV and PRD (RICHARD.DAVIS AND FABATCH) Create Group Data Entries Has been approved by Adil
- 4. Roderick loaded the Pell Grant schedules for 2021-2022 in UAT. Richard to test and request move to PRD
- 5. Roderick loaded additional ISIRs to suspense for testing. The Home Campus Mod and ISIR Load and checklist assignment were tested with no errors. These processes are now ready for production
- 6. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
- 7. Review request for Hemanth to spearhead certain tasks
- 8. Todav:
 - a. Test process to assign letter codes
 - b. Test Com Gen process to produce email
 - c. Review setup for ATB, NSLDS and Edit Message
 - d. Begin testing of the Cal ISIR process
 - e. Begin testing of interface with Campus Logic

a.

FA Processing 5-19-21

Discussion Topics:

Fa Process Testing in UAT

- 1. Tested process to assign letter codes
- Tested Com Gen process to produce email
- 3. Migration of Budgets and Disbursement Dates to DEV for testing
- 4. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
- 5. Update from Hemanth on certain tasks
- 6. Possible update to the Thank You letter template
- 7. Status of 'links' in checklists and emails
- 8. Upcoming meeting with Campus Logic
- 9. Continuing:
 - a. Review setup for ATB, NSLDS and Edit Message
 - **b.** Begin testing of the Cal ISIR process
 - c. Begin testing of interface with Campus Logic

FA Processing 5-21-21

Discussion Topics:

- 1. Status of 'links' in checklists Thanks to Roderick, the 'links' in 50 F22 checklists are now activated i.e. will take the student to the linked URL. This is a gain in function from prior years processing Demo student 10053928 Chklst F22SSI
- 2. Status of 'links' in Thank You email Demo to show areas needing update
- 3. 2021 2022 Forms needed to be added
- 4. When received, Amanda to load Fiscal Item Types for SEOG, FWS and others
- 5. Where can we see what moves the ISIRs to Campus Logic I understand data is moved via a move it script that moves data to OCI and Campus Logic. Do you where this is in the scheduler or someplace else. Also, we need visibility to whatever Chiran has created to complete the student's review status when all checklists are completed along with what is the 105CL that is created
- 6. Review meeting with Campus Logic
- 7. Continuing:
 - a. Review setup for ATB, NSLDS and Edit Message
 - **b.** Begin testing of the Cal ISIR process
 - **c.** Begin testing of interface with Campus Logic

FA Processing 5-24-21

Discussion Topics:

- 11. Pum20 is applied to PRD
- 12. Migrate 2022 setup data to PRD including FTE (Thank you email) template
- 13. Load 2021-2022 Pell Grant Schedules in PRD
- 14. FA is almost ready to process 2021/2022 ISIRS
- 15. Game plan to update FA Links See below
- 16. Amanda to load Fiscal Item Types for SEOG, FWS and others

- 17. We need visibility to whatever Chiran has created to complete the student's review status when all checklists are completed along with what is the 105CL that is created
- 18. RD to have temporary password to FABATCH in PRD to access run controls 19. Continuing:
 - a. Begin testing Cal ISIR process

FA Links:

Hi Amanda and Marla - Regarding the links that can be accessed from the 'Thank You' email: These can be viewed using the test email that was sent.

A review of the links reveals several areas that could be/should be updated. There's a lot here - Let's discuss on Monday the best way forward.

Here's a summary:

- Click on http://web.peralta.edu/financial-aid/documents/ 2021-2022 forms s/b added. 2019-2020 could be deleted
- Look at the Navigation links on the left
 - o Financial Aid Home Is the Contact information for each college accurate?
 - How to Request IRS Verification of Non-filing Letter Refers to calendar year 2016
 - Documents and Forms Add 21/22 and delete 19/20
 - How to Apply for Financial Aid Gives an example for 2015-2016
 - Financial Aid Disbursement Needs to be updated for Fall 2021 and Spring 2022
 - California Promise Grant Should be updated for Aid Year 2021-2022
 - Student Loans Should be updated for Aid Year 2021-2022
 - Consumer Information Annual Estimated Cost of Attendance Should include Cost of Attendance for 2021-2022
 - Financial Aid Meeting Minutes Latest minutes are 2016
 - PCCD Financial Aid Handbook Needs to be updated/replaced to 2021-2022

ISIR Processing Steps – Rev1

- Make sure the scheduled FA Jobs are not activated for the 2021-2022
 processing. The initial ISIR processing will be manual (from the menu) to confirm
 the run controls and the results of the processes. Jobs for ATB, NSLDS, Edit
 Message, FA Term, Budgets are not ready for PRD runs yet
- 2. Make sure the aid year setup is complete in PRD

- 3. Double check the budget items, disbursement dates, AY Rollover, Pell Schedules, etc.
- 4. Make sure the links on the 'Thank You' email work, and the aid year forms, disbursement dates, etc. are updated Test the Thank You email for all 4 colleges to make sure the right logo, etc. appear
- 5. RF to load the 2021-2022 ISIR files in PRD
- 6. RD to run the Override ISIR Home Campus PCC_ISIRCMPS run control PCCFA_ISIR_Campus_Update Must be run the same date the ISIRs are loaded into staging
- 7. RD to run FAPSAR00 for the 4 campuses to load ISIR data
- 8. RD to run Job PCCFACS to assign F22 checklists only
- 9. RD to run processes to assign the FTE letter code only
- 10. RD to run Comm Gen processes to send 'Thank You' email Run control PCCFA_FTE (updated for 2021-2022 aid year)
- 11. Confirm the 3:00PM Move-It process produced/transferred the 21/22 ISIR data to Campus Logic for each campus Log on to Campus Logic to view status Hermanth working with Jackie. Also, add our User Accounts to allow access as an external user
- 12. Begin sending ISIR Correction to CPS and loading correction response files
- 13. Begin processing Cal ISIRs

FA Processing 5-25-21

Discussion Topics:

- 1. Status of individual campus 21/22 ISIR download from CPS:
 - a. Angie replied: The ISIR uploads for 2021-2022 are up to date. The path where they are located is, ISIR > \psfilesprd2.ad.peralta.edu>COA>Archive>2021-2022 ISIRs.
- 2. Loading of Cal ISIRS:
 - a. Angie replied: The Cal ISIR process is a manual load. The path psfilesprd2>CALISIR>COA>Import>21-22 CAL_ISIRs
 - b. Loan replied: Per my understanding, there is no need for the colleges to do anything on our end for the CAL ISIR load Currently, for my college we manually load CA ISIRs, it would be best for this process electronic as well. If so, then please let us know where to place those CA ISIRs files. As long as the CA application in the system is ready then it should be good
- 3. Update on PCCD Financial Aid Website
- Successfully tested the load of 2021-2022 Pell Grant Schedules in UAT. Requested load to PRD
- 5. Aid Year 2022 Pell setup tables completed in PRD. Max Pell increased \$150 from 6345 to 6495 and max EFC increased \$135 from 5711 to 5846

- 6. The requested migration of 2022 data to PRD is complete Currently reviewing in PRD
- 7. Has Chiran responded with information about his creating a process to complete the student's review status when all checklists are completed along with any knowledge about the 105CL that is created?
- 8. Comm Gen 10 test emails sent from UAT on Sunday were not received until Monday
- 9. Testing Cal ISIR process

FA Processing 5-26-21

Discussion Topics:

- 1. Status of FA Website update
- 2. Detailed go live steps for loading Federal ISIRS
- 3. Helping college disburse CARES HEERF II

FA Processing 5-28-21

Discussion Topics:

- 1. Status of loading 21/22 Federal ISIRs
 - a. The ISIR Inbound was run successfully for all colleges to load ISIRs from the staging to the data tables
 - b. Confirm why there are ISIRs remaining in suspense as unprocessed
- 2. Status of FA Website update:
 - a. Cost of attendance being updated
 - b. Financial Aid Home Contact information being updated
 - c. Documents and Forms Add 21/22 and delete 19/20
 - d. Recommendation to change verification comments:
 - e. NOTE Confirm that the links to Campus Logic work!

FROM:

Complete and return the <u>2021-2022 V1 Verification Worksheet</u> via email, fax, mail, or online through CampusLogic by clicking on your college's Verify My FAFSA link below:

https://alamedaperalta.verifymyfafsa.com

https://merritt.verifymyfafsa.com/

https://laney.verifymyfafsa.com/

https://berkeleycitycollege.verifymyfafsa.com/

To:

You can complete the verification online through CampusLogic by clicking on your college's Verify My FAFSA link below:

[list the links]

If you have questions or problems using CampusLogic, please contact your college's financial aid office for assistance.

- 3. Planning for Fall batch packaging
 - a. Target 6/15 but last year was July
- 4. Planning for Summer awarding:
 - a. Summer starts in 2 weeks
 - b. Joe said spring grades post xx?
 - c. SAP should be 6/4
 - d. Target week of June 6th for packaging of Pell
 - e. Revisit summer year-round Pell
 - 5. Helping colleges disburse CARES HEERF II ongoing
 - 6. Resolution of disbursed aid not crediting student's account ongoing
 - 7. Charin to explain the Campus Logic 105CL and process to 'Complete' student's 'Review' status if no checklists remain initiated