The Weekly Bellows
Nine Applications Apart

Workshop packet

October 7, 2026 | Version 1 | Research through October 5, 2026

Bring one report that people rely on, or one student handoff that needs a closer look. Use these pages with a colleague to make the definition, evidence, owner and next action visible. Leave unresolved questions on the page.

For admissions and CRM operations, institutional research, student services, and the appropriate financial-aid or records colleagues. Choose the pages that fit your work; you do not need to complete the whole packet.

Start with one useful question

1. Choose a decision. What will someone do differently because of this count or status?

2. Compare the evidence. Use pages 2 and 3 for two reports, or page 4 for a handoff between people or offices.

3. Agree on the next step. Use page 5 to record an owner and review date. A question can stay open if its next step is clear.

A fictional example from the episode

What the team sees	What the team records
Two completed-application reports are nine apart.	One is a Friday snapshot; the other refreshed Monday morning.
A weekend document upload explains one difference.	One explained; eight still open. The team keeps both time labels and investigates the remaining differences.

CRM State, its people and these events are fictional. This example contains no real student or institutional data.

Use the files in the way that suits you

DOCX: type into blank cells and replace writing lines; duplicate worksheet pages as needed. PDF: print and write by hand. This PDF has no interactive form fields.

Use fictional cases or non-identifying references. Keep student records, supporting documents, credentials and sensitive details in approved institutional systems. Follow your local access and records policies.

The worksheets are original local recommendations, not an evaluated intervention, eligibility determination or compliance checklist. Sources and limits appear on page 6.

Compare the report definitions

Complete this before changing a query or choosing a preferred total. Keep the two reports and their original labels available. Research context: source 1 on page 6.

Decision this count will support

_____

Working session date _____ Participants or roles _____

Definition or evidence	Report A	Report B
Report name and version		
Included population Who or what is counted?		
Exclusions Who or what is left out?		
Qualifying event What makes a record count?		
Time basis and cutoff Snapshot or current view; date, time, time zone		
Source system or dataset		
Query or procedure version Approved location to reproduce it		
Run or extract time Refresh schedule		
Report owner Person or accountable role		
Definition decision owner Who settles a disputed rule?		
Reported count Keep the original value		

Keep both original values. Choose the definition that fits the decision, then record that basis on page 3.

Keep the differences visible

Use one row per difference or group of related exceptions. Record only what the evidence supports. Store any record-level investigation in an approved system.

Count A _____ Count B _____ Difference B minus A _____

Comparison basis for this review _____

Local reference below means a non-identifying label you can resolve inside an approved system. An effect may be a count, a direction, or unknown; distinguish these clearly.

Local reference or group	Evidence and finding	Effect on difference	Next action Owner and review date

Possible questions to test: different cutoffs, a business rule, a join, a duplicate, or a data problem. These are hypotheses until checked.

Differences explained so far and the evidence that supports them

_____

_____

Unresolved exceptions or limits to this comparison

_____

_____

Next review owner and date

_____

Check before closing: the comparison basis is clear; explained differences can be reproduced; unresolved items remain visible; any corrected output has a new version.

Map the student handoff

Walk a fictional case across one boundary at a time. Copy this page for a longer route. Use role names and non-identifying evidence locations. Research context: source 2 on page 6.

Fictional case label _____ Pathway or process _____

What needs to be clear	Handoff 1	Handoff 2
Stage and next milestone		
Responsible person or role Sender and receiver		
Required evidence Authoritative location and permitted editor		
Next contact and explanation What should the learner do or expect?		
Waiting time When does waiting start; who notices?		
Possible failure What might get stuck?		
Correction or next action Who can resolve the problem?		

Initial financing question to take to the appropriate colleague

_____

_____

For an Ability to Benefit pathway, qualified financial-aid staff must check current rules and individual circumstances. A completed milestone does not by itself establish aid eligibility.

Leave with a next action

Use this page to close a short working session. Keep a question open when the answer is not ready, and assign the step that will move it forward.

Session date _____ Review date _____

Decision made or question still open

_____

Action or question	Accountable person or role	Due or review date	Completion evidence or current status

Check the message before it reaches someone

Use fictional recipients and approved test accounts. Record the version and the setup so another colleague can repeat the check. A test describes that message in that setup.

Message version _____ Test account or setup _____

Reviewer _____ Test date _____

[ ] The audience reflects the latest relevant status and exclusions.

[ ] The subject, first visible text and full message give a clear action, date and destination.

[ ] Any eligibility condition or important qualification stays understandable.

[ ] If an approved tool provides a summary, it preserves the action and material conditions.

[ ] A named person owns any correction and the release decision.

What needs to change before release

_____

_____

If a number will be copied into a slide or message, keep its population, time period and material caveat beside it.

Dated reminder and source notes

This packet accompanies the October 7, 2026 edition. Its source review ends October 5, 2026. Check the current official notice before acting on a dated requirement.

FSA active confirmation for designated administrators

Federal Student Aid set the 2026 active-confirmation period for October 2 through December 31. Primary and Secondary Administrators review SAIG mailbox and associated online-service access. Eligibility & Oversight Administrators and alternates review E&O access. This reminder is for those designated roles, rather than a task for every staff member. [3]

FSA states that noncompletion will deactivate users and disrupt access to critical services. Identify the responsible administrators and record completion. An earlier internal review date is a local management choice. [3]

Designated owner or role _____ Internal review date _____

Completion evidence or approved location _____

Sources behind the episode

1. Cook, Bryan J., and Christine M. Keller. Learning from the Initial ACTS Reporting. Urban Institute and Association for Institutional Research, September 30, 2026. Urban publisher summary and AIR publisher summary. Both summarize the same study. Full report methods were unavailable in the episode review; practitioner concerns are not audited error rates.

2. U.S. Department of Education, Office of Career, Technical, and Adult Education. Dual Enrollment for Adults. September 2026; exact publication day unstated. Official resource page and toolkit PDF, printed pages 6-7, 13-14 and 18. The full toolkit was reviewed for the episode. It is implementation guidance, not a causal evaluation or an individual eligibility ruling.

3. Federal Student Aid. Active Confirmation Required by Dec. 31, 2026, to Maintain Access to FSA Systems. October 2, 2026; GENERAL-26-60. Official FSA notice. The notice was reviewed through October 5, 2026. Use its current instructions for the designated administrator role.

How to use the evidence

These original worksheets turn the episode's local recommendations into working prompts. They do not reproduce a vendor report or promise enrollment, accuracy or compliance outcomes. The message checklist is an editorial testing practice; it makes no general claim about inbox behavior.

The fictional example is illustrative only. No real student record, interview or institutional result is represented. Adapt the worksheets within institutional policies and approved systems; consult the appropriate qualified colleague for aid, access or compliance questions.