
PeopleSoft Enterprise Financial Aid 9.0 PeopleBook

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PeopleSoft Enterprise Financial Aid

Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise Campus Solutions Application Fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Financial Aid.

PeopleSoft Enterprise Campus Solutions Application Fundamentals

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation called *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook* and *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Campus Solutions Preface"

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "PeopleSoft Enterprise Campus Community Preface"

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

<i>Chapters</i>	<i>Description</i>
Preface	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	<p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	<p>(Optional) Some PeopleSoft applications provide modified navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains modified navigation pages, this chapter provides basic navigation information for these pages.</p> <p>Note. Not all applications have delivered modified navigation pages.</p>
Understanding...	<p>(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.</p>

Chapters	Description
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p>Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p>
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality.</p> <p>Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.</p>
Appendixes	<p>(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.</p>
Delivered Workflow Appendix	<p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.</p> <p>Note. Not all applications have delivered workflows.</p>
Reports Appendix	<p>(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.</p>

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Common Elements Used in This PeopleBook

Academic Career

Designates all course work undertaken by a student at your academic institution that you group together in a single student record. For example, a university that has an undergraduate school, a graduate school, and several professional schools can define an undergraduate career, graduate career, and a separate career for each professional school.

Academic Institution

A separate entity, such as a university or college, that runs independently from other like entities and has its own set of rules and business processes. Throughout your student administration system you use Academic Institution as a key value to group data into tables and search against those tables to extract data.

Academic Plan	An area or areas of study that a student declares after the student is admitted to an academic program. Academic plans are linked to academic careers or academic programs.
Academic Program	The entity to which a student applies, is admitted, and ultimately graduates. Rules such as academic standing, honors/awards, and repeats are attached at the academic program level.
Academic Sub-plan	Academic subplans can be defined as minors, concentrations, or specializations. They are directly linked to an academic plan.
Academic Year	The period of time you define as one school year.
Aid Year	Used in Financial Aid to designate a year of accounting for financial aid awarding.
Career	See <i>Academic Career</i> .
Institution	See <i>Academic Institution</i> .
Item Type	Identifier that classifies an item on a customer's account. Item types enable schools to uniquely categorize a customer's bill.

Chapter 1

Getting Started with Financial Aid

This chapter provides an overview of Financial Aid and discusses:

- Financial Aid business processes.
- Financial Aid integrations.
- Financial Aid implementation.

Financial Aid Overview

Financial Aid automates federal and institutional financial aid processing for a more efficient operation. It provides flexibility and helps you manage financial aid activity for applicants and students.

With this application, you can:

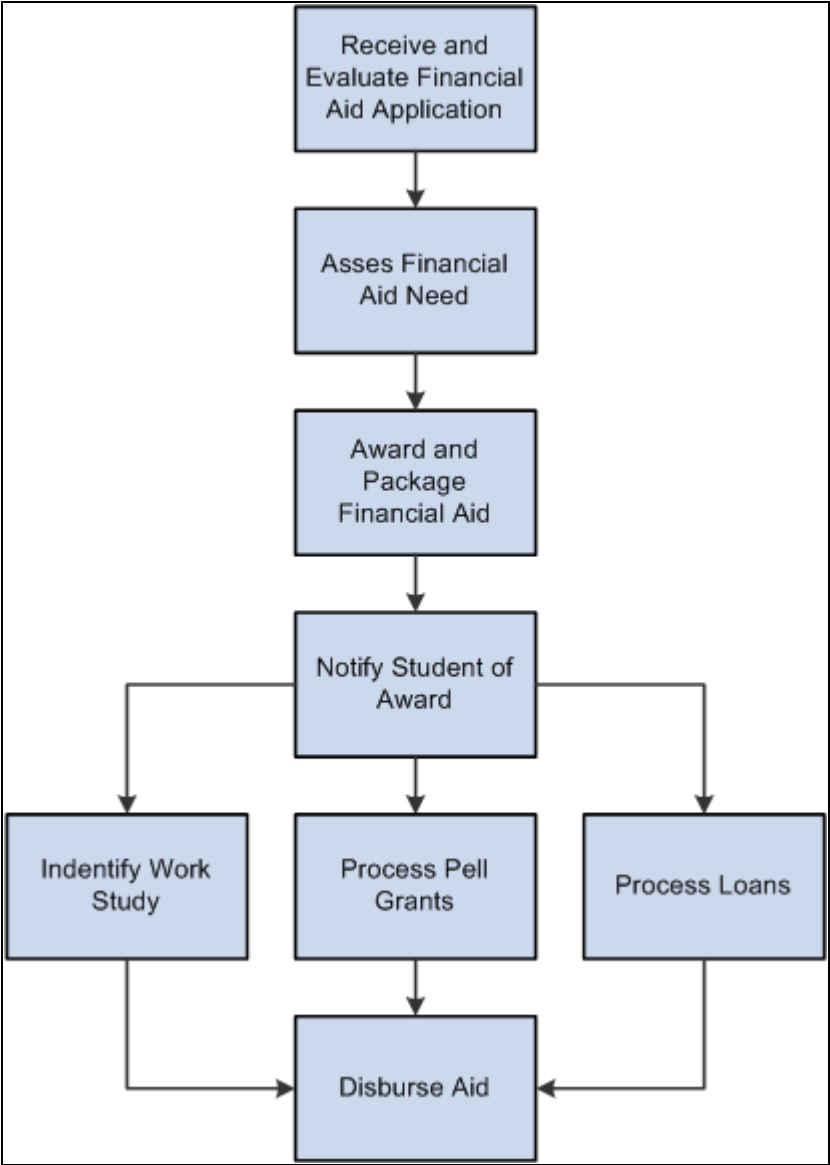
- Receive and track financial aid applications.
- Design cost of attendance assessment by defining budget categories, items, and formulas.
- Manage need analysis, packaging, disbursement, and loan processing.
- Process origination and disbursement for FFELP, Direct Loan, and Pell Grant programs.
- Calculate federal Pell awards.
- Use award plans to automatically package students.
- Match financial aid sources to eligible students.
- Modify financial aid notification letters.
- Maintain federal compliance with annual regulatory updates for ISIR, Pell, Direct Loan, FISAP, and other federal updates.
- Post financial aid to student accounts.
- Provide students with self-service access to view, accept, and decline awards.
- Manage student work-study programs.

Financial Aid Business Processes

Financial Aid supports local management and awarding of federal aid, state aid, institutional aid, departmental aid, and scholarship funds. After you set up the system based on your institution's rules and practices, you can begin to receive and track financial aid applications. The awarding practice takes place when your institution receives the ISIR, PROFILE, Need Access, or institutional application. After you load need analysis data, the system activates the student for the aid year. Activation of the aid year is the first step in updating student data for financial aid processing.

You can manually award a student or use award plans to automatically package a student. The Packaging process finds the best combination of aid to meet a student's financial need. Disbursing aid to students involves authorizing each disbursement. The system checks the disbursement rules that you have defined and determines whether a particular award can be disbursed. For the aid cycle to be successful, you must verify selected students, handle ISIR corrections, process budgets, track requested documents and loan applications, and monitor spending and reconciliation of funds.

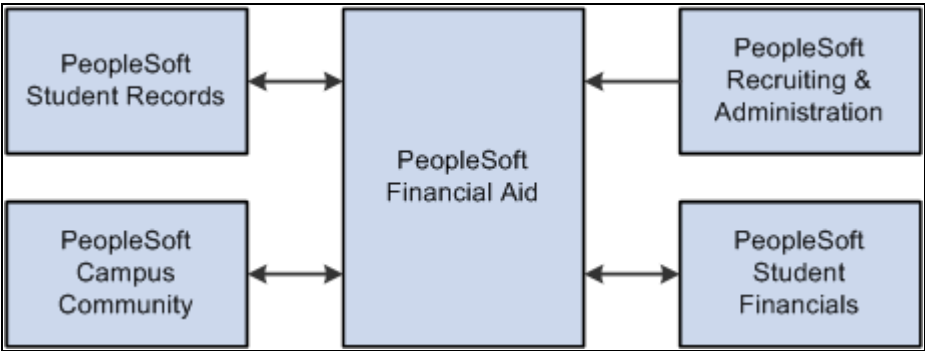
The following process flow illustrates the Financial Aid business process:



Financial aid business process

Financial Aid Integrations

Financial Aid integrates with the following applications within PeopleSoft Enterprise Campus Solutions:



Financial Aid integrations

PeopleSoft Enterprise Campus Community

Financial Aid integrates with Campus Community to receive personal, demographic, and relationship data.

PeopleSoft Enterprise Student Records

Financial Aid integrates with Student Records to create financial aid term data to determine financial aid eligibility.

PeopleSoft Enterprise Recruiting and Admissions

Financial Aid integrates with Recruiting and Admissions to create prospect data and provide early financial aid offers.

PeopleSoft Enterprise Student Financials

Financial Aid integrates with Student Financials to manage financial aid and track student disbursements, charges, and payments.

Financial Aid Implementation

Financial Aid enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Financial Aid also provides component interfaces to help you load data from your existing system into Financial Aid tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interface	References
AGGR_AID_TBL	SFAA_AGGR_AID_TBL	See Chapter 5, "Setting Up Packaging Basics," Setting Up Aggregate Aid, page 93.

Component	Component Interface	References
AID_YEAR_CAR_TERM	SFAG_AID_YR_CAR_TERM	See Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Valid Terms for Careers, page 26.
AWARD_MESSAGES	SFAA_AWARD_MESSAGES	See Chapter 5, "Setting Up Packaging Basics," Setting Up Award Messages, page 108.
BUDGET_GROUP_TABLE	SFAB_BUDGET_GROUP_TABLE	See Chapter 4, "Setting Up Student Budgets," Creating Budget Groups, page 65.
BUDGET_ITEM_TABLE	SFAB_BUDGET_ITEM_TABLE	See Chapter 4, "Setting Up Student Budgets," Defining Budget Items, page 58.
FINANCIAL_AID_ITEM	SFAG_FINANCIAL_AID_ITEM	See Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112.
TIV_SCHOOL_CODE_TBL	SFA_TIV_SCHOOL_CODE	See Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Your School Code, page 11.

The following is a list of tasks that you should complete as part of setting up your financial aid system:

- Design your financial aid awarding cycle. Decide how you want to implement your operational structure, awarding practices, and institutional procedures to work with your system.
- Associate the financial aid year with your school code and identify all possible careers for each aid year and school code.
- Specify which academic careers qualify for financial aid and set up the terms for each financial aid career.
- Establish general financial aid processing defaults on the Financial Aid Defaults page. Default values can remain the same for many aid years and apply to students regardless of their career.
- Assign the appropriate rule sets for need analysis calculations and financial aid processing.
- Set up level/load rules with the student records staff. Set up and build financial aid terms.
- Set up student budgets. Create budget categories and budget items within each category. Use budget formulas and budget trees to set eligibility criteria for each budget item.
- Set up global application processing options.
- Set up financial aid item types and define packaging and awarding rules.
- Set up processing options for all loans awarded to your students by your institution.
- Define Pell installation defaults, Pell institution identification, and payment information.
- Establish disbursement rules.
- Define which financial aid item types are used for Return of Title IV Fund calculations.
- Set up self-service options.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft resources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines.

See Also

"PeopleSoft Enterprise Financial Aid Preface," page xlvii

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

Chapter 2

Setting Up Your Financial Aid Awarding Cycle

This chapter provides an overview of the financial aid awarding cycle, lists prerequisites, and discusses how to:

- Establish aid years.
- Set up your school codes.
- Establish defaults.
- Establish careers and programs.
- Activate an aid year for a student.
- Review National Student Loan Data System (NSLDS) codes.
- Define aid year rollover.

Understanding the Financial Aid Awarding Cycle

The financial aid awarding cycle is a set of recurrent operations used by institutions when they process and manage student data to evaluate, award, and disburse federal, state, institutional, and private funding. The typical financial aid processing cycle may encompass multiple academic years. Institutions process continuing students for the current aid year and, at the same time, process applications for the upcoming aid year.

One of the first steps in setting up your awarding cycle is to define the boundaries of each financial aid year to maintain separate and unique financial aid years throughout a student's educational career. In addition to setting up the aid year, your institution must associate the financial aid year with your school code or codes and identify all possible careers for each aid year and school code. School codes are defined by the U.S. Department of Education and are used to track a student's aggregate aid history. An institution might have separate school codes for a medical school and a law school. Because school codes do not share careers, you must link each school code and academic career separately.

You must specify which academic careers qualify for financial aid and set up valid terms for each financial aid career. Doing so provides the general guidelines to award and process aid within the award year. For example, your institution might have an evening degree program that does not award financial aid or offer financial aid for all of its academic terms.

The actual Awarding process takes place when your institution receives the first Institutional Student Information Records (ISIRs), PROFILE, Need Access, or institutional application. The ISIR is the need analysis form administered by the Department of Education to establish a student's need for financial aid. PROFILE and Need Access are two other types of need analysis forms that establish a student's financial aid need. Institutional applications are institution-specific need analysis forms. For new students, awards are made and notifications are sent on an ongoing basis up to the beginning and sometimes well into the award year for which the students are admitted. For continuing students, the goal is to mail notifications before the close of the academic year. The financial aid process of awarding entails need analysis and, for continuing students, checking academic progress.

In addition to the awarding cycle, the following processes must occur in the financial aid office for each aid cycle:

- Loading ISIRs and PROFILE or Need Access applicant data.
- Entering institutional application information.
- Verifying selected students.
- Handling ISIR corrections.
- Processing budgets for the current and upcoming award years.
- Tracking requested documents and loan applications.
- Monitoring all spending and reconciliation of funds.
- Managing origination and disbursement of Title IV/Campus Based programs.
- Providing ongoing loan entrance and exit counseling.
- Defining aid year rollover.

Prerequisites

Before implementing the Financial Aid system, examine how your financial aid office and your institution function. To take advantage of the flexibility of the PeopleSoft Enterprise Campus Solutions system, decide how you want to implement your operational structure, awarding practices, and institutional procedures within the Financial Aid system.

When you prepare to set up the Financial Aid system:

- Decide what data elements you want converted for use in your new system if you are moving from a legacy system.
- Identify and decide which academic careers are valid for awarding and processing of financial aid after you establish your institution's academic structure.

The creation and design of academic careers is carried out primarily by the staff that operates PeopleSoft Enterprise Student Records.

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Creating Aid Processing Rule Sets, page 21.](#)

- Identify which terms and sessions are valid for awarding and processing of financial aid after you establish your institution's academic structure.

The design and creation of terms and sessions is carried out primarily by the staff that operates Student Records.

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Establishing Terms and Sessions."

- Determine all aspects that need to be considered for the setup process.

Consider your institutional and financial aid office needs in broad terms. This plan should include such items as your term structure, the Title IV school codes for your institution, your packaging policies, your disbursement patterns, financial aid fund information, and any business practices that are unique to your institution.

Establishing Aid Years

To set up aid years, use the Define Federal Aid Years (FED_AID_YR_TBL) and Define Financial Aid Years (AID_YEAR_TABLE) components.

This section discusses how to:

- Define federal aid years.
- Associate federal aid years with academic years.

Pages Used to Establish Aid Years

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Federal Aid Year Setup	FED_AID_YR_TBL	Set Up SACR, Product Related, Financial Aid, Aid Year, Define Federal Aid Year, Federal Aid Year Setup	Set up the Federal Aid Year table.
Financial Aid Year	AID_YEAR_TABLE	Set Up SACR, Product Related, Financial Aid, Aid Year, Define Financial Aid Years, Financial Aid Year	Associate a valid federal aid year with the academic year of your institution.

Defining Federal Aid Years

Access the Federal Aid Year Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Define Federal Aid Year, Federal Aid Year Setup).

Federal Aid Year Setup

Aid Year 2010

Aid Year Information			
*Description	Federal Aid year 2009 - 2010	Short Description	2009- 2010
*Start Date:	08/11/2009	*End Date:	06/26/2010

Federal Aid Year Setup page

This table defines the aid year according to the standards set by the U.S. Department of Education. You must define all aid years that you are processing in this table.

Enter the days that the aid year begins and ends.

Associating Federal Aid Years with Academic Years

Access the Financial Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Define Financial Aid Years, Financial Aid Year).

Financial Aid Year

Academic Institution: PSUNV PeopleSoft University

Aid Year Setup						Find View All First 1-8 of 14 Last
*Aid Year	Description	Short Desc	Academic Year			
			Start Date	End Date		
2010	Financial Aid Year 2009 - 2010	2009-2010	08/11/2009	06/26/2010		
2009	Financial Aid Year 2008 - 2009	2008-2009	08/11/2008	06/26/2009		
2008	Financial Aid Year 2007 - 2008	2007-2008	08/13/2007	06/27/2008		
2007	Financial Aid Year 2006 - 2007	2006-2007	08/14/2006	06/29/2007		
2006	Financial Aid Year 2005-2006	2005-2006	08/12/2005	06/30/2006		
2005	Financial Aid Year 2004-2005	2004-2005	08/15/2004	06/30/2005		
2004	Financial Aid Year 2003-2004	2003-2004	07/01/2003	06/30/2004		
2003	Financial Aid Year 2002-2003	2002-2003	08/15/2002	05/30/2003		

Financial Aid Year page

Aid Year

Select the federal aid year to be associated with your academic year start and end dates.

Academic Year Start Date and Academic Year End Date Enter the dates that your institution's academic year begins and ends. Academic year start and end dates are reported on the origination record to the Common Origination and Disbursement (COD) system.

Setting Up Your School Codes

To set up school codes, use the School Code Table (TIV_SCHOOL_CODE) and School Codes for Institutions (INST_SCHOOL_CDS1) component. Use the TIV_SCHOOL_CODE_CI component interface to load the data into the tables for this component interface.

Title IV school codes are delivered in the first update for each aid year. The table is pre-loaded with the Title IV school codes as defined by the U.S. Department of Education. A school code is assigned to each institution participating with the Department of Education and is used as an identification code during Electronic Data Exchange (EDE). In addition to its use in EDE processing, the Title IV school code is used to track a student's aggregate aid history.

This section discusses how to:



- Define your school code.
- Associate federal aid years with an aid year.

Pages Used to Set Up School Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TIV School Code Information (Title IV school code information)	TIV_SCHOOL_TABLE	Set Up SACR, Product Related, Financial Aid, Aid Year, School Code Table, TIV School Code Information	Review the Title IV School Code Table and enter a description and address information for your school code.
School Codes for Institution	INST_SCHOOL_CDS	Set Up SACR, Product Related, Financial Aid, Aid Year, School Codes for Institution, School Codes for Institution	Link an aid year with the Department of Education Title IV school codes for your institution.

Defining Your School Code

Access the TIV School Code Information page (Set Up SACR, Product Related, Financial Aid, Aid Year, School Code Table, TIV School Code Information).

TIV School Code Information			
School Code:	001004	Aid Year:	2009 Federal Aid Year 2008 - 2009
School Information			
Description	UNIVERSITY OF MONTEVALLO		
Short Description	UNIVERSITY		
Address:	PALMER CIRCLE		
City:	MONTEVALLO		
St/Prov:	AL 	Country:	USA 
Postal:	35115		
<input type="checkbox"/> TIV Inst Code DL Participant			

TIV School Code Information page

You can add or correct information on this page if the U.S. Department of Education has made an error or omission in the description or address information for your institution.

Title IV Inst Code DL Participant (Title IV institution code direct loan participant) Select if your institution participates in the federal Direct Lending Program. No processing is associated with this field.

Associating School Codes with an Aid Year

Access the School Codes for Institution page (Set Up SACR, Product Related, Financial Aid, Aid Year, School Codes for Institution, School Codes for Institution).

School Codes for Institution

Academic Institution: PSUNV PeopleSoft University Copy from Previous Year

Aid Year: 2010 Financial Aid Year 2009 - 2010

		Customize		First ◀ 1-4 of 4 ▶ Last	
	Aid Year	*School Code	*Description	Short Description	
1	2010	001315	PeopleSoft University	PeopleSoft	
2	2010	001316	PeopleSoft Virtual University	PSVU	
3	2010	001317	PeopleSoft Community College	PSCC	
4	2010	001319	PeopleSoft Law	PSLAW	

School Codes for Institution page

- School Code** Select the school code that you want to associate with the displayed aid year. If your institution has more than one school code, you can add rows and enter as many school codes as you need.
- Copy from Previous Year** Click to copy the school codes entered for the previous aid year to the current aid year. This process overrides any information that you have entered for the current aid year.

Establishing Defaults

To set up defaults, use the Installation Defaults (INSTALLATION_FA) and Aid Processing Rule Setup (FA_DFLT_RULE_SET) components.

This section provides an overview of defaults and discusses how to:

- Define installation level defaults.
- Create aid processing rule sets.
- Link aid processing rule sets to careers and programs.

Understanding Defaults

Many of the setup pages in the Financial Aid system are specific to an aid year or a career. However, the various processes in the system use certain general financial aid processing values as default values. These default values remain the same for many aid years and apply to students regardless of their career. Therefore, these defaults are established on one page, the Financial Aid Defaults page, which is not keyed by aid year or career, and are applied to all institutions in your system. When you establish your installation defaults, select the values that represent the majority of your institutions, careers, and programs.

Financial Aid provides additional flexibility in creating aid processing defaults. If certain careers or programs require default values that vary from the installation defaults, you can establish aid processing rule sets at either a career-specific or program-specific level to define alternate values for selected defaults. These default options include:

- Academic and nonstandard base weeks.
- Pell Grant eligibility calculation criteria.
- Grants Administration and Payment System (GAPS) financial aid item types.
- Packaging data source defaults.
- Institutional application source.
- Pell number of terms.

The aid processing rule set can then be associated with the career that varies from the installation defaults, or the program that varies from both the career and installation defaults.

Set up aid processing rule sets only for those combinations of aid year and career that differ from each other and from your installation defaults and for those combinations of aid year and program that differ from each other, from the associated career level defaults, and from your installation defaults.

Associate these rule sets with the appropriate aid year and career combination on the Valid Careers for Aid Year page or with the appropriate aid year and program combination on the Valid Programs for Aid Year and Career page. If a career or program does not vary from the installation defaults, you *do not* need to establish and assign an aid processing rule set for that career or program.

Note. If no careers or programs differ from the installation defaults, you do not need to create aid processing rule sets, and you can leave the Aid Processing Rule Set column blank on both the Valid Careers for Aid Year and Valid Programs for Aid Year and Career pages.

Because the default aid processing rules for an individual student can be defined at the program, career, or installation level, various financial aid processes check for defaults in the following order to ensure that the correct aid processing rules are used:

1. Aid processing rule set associated with the student's program.
2. Aid processing rule set associated with the student's career.
3. Installation defaults specified on the Financial Aid Defaults page.

Pages Used to Establish Defaults

Page Name	Definition Name	Navigation	Usage
Financial Aid Defaults	INSTALLATION_FA	Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults	Define general financial aid processing defaults at the installation level.

Page Name	Definition Name	Navigation	Usage
Aid Processing Rule Setup	FA_DFLT_RULE_SET	Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup	Create aid processing rule sets that you can use to define defaults at the career and program level that differ from the installation default values.

Defining Installation Level Defaults

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

Financial Aid Defaults

Academic Base Weeks:

Non-Standard Base Weeks:

Pell 3 Academic Weeks Only ☒

INAS Rule Set:

***Pell Calculation Start:**

***Pell Calculation Midterm:**

***Pell Calculation Census:**

***Pell Number of Terms:**

GAP Item Type:

***Packaging Data Source:**

***Aggregate Source:**

Inst Application Source:

CNAS FM Rule Set:

CNAS IM Rule Set:

Last Loan Batch Sequence:

Loan Counseling Version:

Activation Indicators

☒ Freshman Loan 30 Day Delay

☐ Pell Just In Time Institution

☐ FFELP Serial MPN Activation

☒ Audit FATerm Build

☐ Do Not use PKG Data Source

Background Errors Allowed:

Last Packaging Batch Nbr:

Financial Aid Defaults page

Academic Base Weeks Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC).

Valid values are 0.0 to 99.9.

Non-Standard Base Weeks	<p>Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions.</p> <p>Valid values are 0.0 to 99.9.</p>
Pell 3 Academic Weeks Only	<p>Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction.</p> <hr/> <p>Note. Academic Base Weeks and Non-Standard-Base Weeks are added together to determine an Academic Program's Weeks of Instruction. This Weeks of Instruction value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3— FA Load, Formula 3—Current Load, and Formula 3 — Full-time Load.</p> <hr/>
INAS Rule Set (institutional need analysis system rule set)	<p>Select an INAS rule set to define need analysis calculation options for your student population that do not have an academic career specified in the Financial Aid Term record or in the Student Career Term table. You can use a different rule set for any career or program by establishing a relationship between the career and rule set on the Valid Careers for Aid Year page (AID_YEAR_CAREER) or the program and rule set on the Valid Programs for Aid Year and Career page (AID_YEAR_PROGRAM).</p> <p>The INAS rule set value provides full flexibility to determine how need analysis is performed. You load the INAS Rule Set table into the system by using a data mover script that is delivered to your institution each year in a regulatory release.</p> <p>Select the INAS Rule Set from these values: <i>CSS Rules</i>, <i>Health Pro</i> (health professional), or <i>Ugrd/Grad</i> (undergraduate/graduate).</p> <p>The INAS rule sets are delivered as translate values and should not be changed or altered in any way. You can create additional INAS rules sets for your institution by creating additional translate values.</p>

Pell Calculation Start

Enter the option to use for Pell calculations made before the student's academic term start date. Values are:

Enrollment Current Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the Current Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term.

Enrollment FA Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the FA Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The FA Load value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load.

Formula 1 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant award by the Pell Number of Terms and uses the student's actual FA Load for each term.

Formula 1 — Full-time (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term.

Formula 3 — Current Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

Formula 3 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Formula 3 — Full-time Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Full Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment.

Half Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.

**Pell Calculation
Midterm**

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

Pell Calculation Census

Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.

Pell Number of Terms

Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using the *Formula 1 - FA Load*, *Formula 1 - Full-time*, *Full Time*, or *Half Time* Pell calculation values. If you select *Formula 1 — FA Load* or *Formula 1 — Full-time*, you must populate the Pell Number of Terms field.

GAP Item Type(Grants
Administration and
Payment System item
type)

Select the GAP financial aid item type that you created for this instance. GAP is an artificial figure that instructs Packaging to set aside an amount of unmet need to be funded later. It prevents full funding to any student to conserve funds or to provide room to award other types of aid in the future. The GAP financial aid item type that you enter here is used when you assign a GAP packaging rule in a packaging plan.

See [Chapter 5, "Setting Up Packaging Basics," Defining GAP Financial Aid Item Types, page 131.](#)

Packaging Data Source	<p>Select which application data to use when packaging a student for financial aid. The system also tells the Equation processor which application data to gather for use in equations.</p> <p><i>Fed Only</i> (federal only): This is the default value that instructs Packaging to gather data from the ISIR_** records. When <i>Fed Only</i> is selected, students are packaged only if they have federal application data (ISIR) available. If <i>Fed Only</i> is selected and the student has no ISIR data, the student is <i>not</i> packaged and the following error message is displayed during packaging:</p> <p><i>Student has no ISIR data.</i></p> <p><i>Fed, Inst</i> (federal, institutional): Instructs Packaging to gather federal application data (ISIR) if available. Otherwise, Packaging gathers institutional application data (PROFILE or Need Access). If neither federal nor institutional application data exists for the student, the student is <i>not</i> packaged and the following error message is displayed during packaging:</p> <p><i>Student has neither ISIR nor Institutional data.</i></p> <p><i>Inst Only</i> (institutional only): Instructs Packaging to gather data from the INST_** records. When <i>Inst Only</i> is selected, students are packaged only if they have institutional application data (PROFILE, Need Access, or institutional application) available. If <i>Inst Only</i> is selected and the student has no PROFILE or Need Access data, the student is <i>not</i> packaged and the following error message is displayed during packaging:</p> <p><i>Student has no Institutional data.</i></p> <p><i>Inst, Fed</i> (institutional, federal): Instructs Packaging to gather institutional application data (PROFILE, Need Access, or institutional application) if available. Otherwise, Packaging gathers federal application data (ISIR). If neither institutional nor federal application data exists for the student, the student is not packaged and the following error message is displayed during packaging:</p> <p><i>Student has neither ISIR nor Institutional data.</i></p>
Aggregate Source	<p>Select the source for aggregate lifetime totals that Packaging should reference when determining lifetime limits. Values are:</p> <p><i>NSLDS</i>: Packaging uses National Student Loan Data System (NSLDS) aggregate history totals that have been pushed into the PeopleSoft aggregate tables for packaging. NSLDS aggregate history data can be loaded and pushed directly during ISIR and FAH data loads.</p> <p><i>PS</i>: This is the default value. Packaging uses the existing undergraduate and graduate totals currently maintained by the institution on the aggregate tables for packaging.</p> <hr/> <p>Note. Aggregate Source is set either at the installation default level or individually for each student on the Packaging Status Summary or award page components.</p> <hr/>
Inst Application Source (institutional application source)	<p>Enter the institutional application used when you select <i>Fed</i>, <i>Inst</i>, <i>Inst Only</i>, or <i>Inst, Fed</i> as the Packaging Data Source. You can select <i>Inst App</i> (institutional application), <i>NA</i> (Need Access), or <i>Profile</i>.</p>

CNAS FM Rule Set (Canadian need analysis system federal methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that use federal methodology.
CNAS IM Rule Set (Canadian need analysis system institutional methodology rule set)	Enter the rule set that defines the CNAS calculation guidelines that uses institutional methodology.
Last Loan Batch Sequence	Enter a new sequence number of the last loan batch ID code processed. The system automatically updates this field each time a CommonLine or Direct Loan transaction file is created. You may need to update this if a conflict occurs.
Do Not Use PKG Data Source (do not use a packaging data source)	<p>Select this check box to have the system not check for either an existing federal application (ISIR) or an institutional application (such as PROFILE or Need Access) when accessing the Award Entry component.</p> <p>Clear this check box to have the system check for the existence of either a federal application or an institutional application when accessing the Award Entry component. If the student doesn't have either application, a warning message appears.</p>
Background Errors Allowed	Enter the number of background errors that your institution wants to allow during background processing before the system terminates the run. You may want to set this field to a number greater than one. If you do not increase this value, background processing stops after encountering only one error.
Last Packaging Batch Nbr (last packaging batch number)	Displays the number that the system generates when you run the Mass Packaging process.

Activation Indicators

Freshman Loan 30 Day Delay	Select to ensure that loans awarded to first-time, first-year students are assigned to a disbursement plan with the 30 Day Delay Loan Plan option selected.
Pell Just In Time Institution	Select if your institution participates in the Just-In-Time program for Pell funding. This sets the Just-In-Time flag. When this flag is set, the Pell Disbursement Outbound process compares the disbursement date to the system date and does not process outbound records if the process date is more than three days from the disbursement date found on student award tables. Based on accepted origination and disbursement records, the funds for the requested disbursement are directly deposited into your institution's account.
FFELP Serial MPN Activation (federal family educational loan program serial master promissory note activation)	Select to indicate that your institution qualifies for serial master promissory note (MPN) processing. The field controls the default settings of the serial MPN fields in the CommonLine loan destination profile components. Select even if you have groups within your institution that do not qualify for serial MPN processing based on a regulatory or school policy.

Audit FA Term Build
(audit financial aid term build)

Select to cause the system to write a row to the audit table if any changes occur to audited fields when you rebuild an FA term. View changes to the audited fields for a student using the FA Term Field Audits page. If you clear this check box, you cannot view the FA Term Field Audits page.

See Also

[Chapter 27, "Preparing for Awarding and Packaging," Selecting Your Application Data Source for Awarding, page 935](#)

[Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Defining Packaging Plans, page 247](#)

[Chapter 29, "Awarding Pell Grants," Awarding Pell Grants for the 2010 and Future Aid Years, page 1035](#)

Creating Aid Processing Rule Sets

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup).

Aid Processing Rule Setup

Aid Processing Rule Set: FAID

Description: Financial Aid Short Description: FINAID

Fields for use on Career and/or Program level:

Academic Base Weeks: 30.0

Non-Standard Base Weeks: 8.0

Pell 3 Academic Weeks Only ☐

Pell Calculation Start: Formula 1 - FA Load

Pell Calculation Midterm: Formula 1 - FA Load

Pell Calculation Census: Formula 1 - FA Load

Pell Number of Terms: 2

Fields for use on Career level only:

GAP Item Type:

Packaging Data Source: Federal 1st, Institutional 2nd

Application Source: Profile

Aid Processing Rule Setup page

Create as many rule sets as necessary for your business practices. The aid processing rule sets created on this page can be associated with a combination of aid year and academic career or aid year and academic program.

Enter a value for all fields on this page. The fields in the Fields for use on Career level only group box cannot differ for programs within the same career. If you are defining aid processing rule sets for multiple programs within a career, the values that you select in this group box should be the same for both aid processing rule sets. If you select different values, Packaging uses the values from the first aid processing rule set associated with the career for these fields.

The fields on this page correspond to those on the Financial Aid Defaults (INSTALLATION_FA) page.

Note. The Pell Number of Terms field is at the Academic Program Level.

See Also

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Installation Level Defaults, page 15

Linking Aid Processing Rule Sets to Careers and Programs

Complete the Valid Career for Aid Year page, as described later in this chapter. (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

See Also

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Listing Valid Careers for the Aid Year, page 24

Establishing Careers and Programs

To set up careers and programs, use the Valid Careers for Aid Year component (AID_YEAR_CAREER), Valid Programs for Aid Year component (AID_YEAR_PROGRAM), Careers for School Codes component (SCHOOL_CAREER1), Valid Terms for Career component (AID_YR_CAR_TERM), and the Define Career Types component (CAREER_TYPE). Use the AID_YR_CAR_TERM_CI component interface to load the data into the tables for this component interface.

This section discusses how to:

- List valid careers for the aid year.
- Define valid programs for aid year and career.
- Associate careers with school codes.
- Define valid terms for careers.
- Assign financial aid career types.

Pages Used to Establish Careers and Programs

Page Name	Definition Name	Navigation	Usage
Valid Careers for Aid Year	AID_YEAR_CAREER	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year	List all academic careers that are eligible for financial aid during an aid year for an academic institution and assign the appropriate rule sets for need analysis calculations and for financial aid processing.
Copy Careers for Aid Year	AID_YR_CAR_COPY	Click the Copy button on the Valid Careers for Aid Year page.	Copy valid careers from one combination of academic institution and aid year to another.
Valid Programs for Aid Year and Career	AID_YEAR_PROGRAM	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year, Valid Programs for Aid Year and Career	Assign rule sets for need analysis calculations and assign financial aid processing rule sets that are specific to a program.
Copy Programs for Aid Year and Career	AID_YEAR_PROG_COPY	Click the Copy button on the Valid Programs for Aid Year and Career page.	Copy program-level defaults from one combination of academic institution, aid year, and career to another.
Careers For School Codes	SCHOOL_CAREER	Set Up SACR, Product Related, Financial Aid, Aid Year, Careers for School Codes	Specify the valid careers that exist for each Title IV school code at your institution.
Copy Careers for School Code	SCHOOL_CAR_COPY	Click the Copy button on the Careers for School Codes page.	Copy valid careers from one combination of academic institution, aid year, and school code to another.
Valid Terms for Careers	AID_YR_CAR_TERM	Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Terms for Careers	Define the eligible financial aid terms for each combination of academic career and aid year after you have specified the valid careers for each aid year.
Financial Aid Career Type	CAREER_TYPE	Set Up SACR, Product Related, Financial Aid, Financial Aid Terms, Define Career Types, Financial Aid Career Type	Associate each of your academic careers with a financial aid career type.

Listing Valid Careers for the Aid Year

Access the Valid Careers for Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

Valid Careers for Aid Year

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2010 Financial Aid Year 2009 - 2010

Copy

Valid Academic Careers
Customize | Find
First 1-8 of 8 Last

*Academic Career	*Description	Short Description	INAS Rule Set	CNAS FM Rule Set	CNAS IM Rule Set	Aid Processing Rule Set		
BUSN	Graduate Business	Grad Bus	CSS Rules			FAID	+	-
CNED	Continuing Education	Contng Ed	CSS Rules			FAID	+	-
GRAD	Graduate	Graduate	Ugrad/Grad			FAID	+	-
LAW	Law	Law	CSS Rules			FAID	+	-
MEDS	Medical School	Medical	Health Pro			GENL	+	-
TECH	Technical	Technical	CSS Rules			FAID	+	-
UENG	Undergraduate Engineering	Ugrad Engr	Ugrad/Grad			FAID	+	-
UGRD	Undergraduate	Undergrad	Ugrad/Grad			FAID	+	-

Valid Careers for Aid Year page

Insert additional rows for all academic careers for this aid year at your institution.

INAS Rule Set

(institutional need analysis system rule set)

Select an Institutional Need Analysis (INAS) rule set to define need analysis calculation options to associate with this career.

The INAS rule set value provides full flexibility to determine how need analysis is performed. You load the INAS Rule Set table into the system using a data mover script delivered to your institution each year in a regulatory release.

Select the INAS Rule Set from these values: *CSS Rules*, *Health Pro* (health professional), or *Ugrad/Grad* (undergraduate/graduate).

The INAS rule sets are delivered as translate values and should not be changed or altered in any way. You can create additional INAS rules sets for your institution by creating additional translate values.

CNAS FM Rule Set

(Canadian Need Analysis System federal methodology rule set)

Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with federal methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).

CNAS IM Rule Set

(Canadian Need Analysis System institutional methodology rule set)

Select the CNAS rule set that provides calculation guidelines that define general need analysis to use for processing with institutional methodology. This value is whatever your institution set up as CNAS rule sets such as CSL (Canada Student Loan) and OSL (Ontario Student Loan).

Aid Processing Rule Set For careers that have different default processing values from those specified at the installation level (on the Financial Aid Defaults page), select the aid processing rule set that you created that contains the correct default processing values for this career. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Career.

Copy Click this button to access the Copy Careers for Aid Year page and copy valid careers from one combination of academic institution and aid year to another.

See Also

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13

Defining Valid Programs for Aid Year and Career

Access the Valid Programs for Aid Year and Career page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year, Valid Programs for Aid Year and Career).

Valid Programs for Aid Year and Career

Academic Institution: PSUNV PeopleSoft University Copy
Aid Year: 2009 Financial Aid Year 2008 - 2009
Academic Career: MEDS Medical School

Valid Academic Programs							Customize	Find	First	1 of 1	Last
*Academic Program	*Description	Short Description	INAS Rule Set	CNAS FM Rule Set	CNAS IM Rule Set	Aid Processing Rule Set					
MED	Medicine	Medicine	CSS Rules			MEDS					

Valid Programs for Aid Year and Career page

Enter only those programs that require a different need analysis or aid processing rule set than the installation defaults or the rule sets assigned to the program's career. If none of the academic programs within a career requires rule sets that differ from the career's rule sets, do not set up any programs for that career on this page.

For each academic program that you enter on this page, enter only those fields that differ from the career's value or the installation default value. For example, if the academic program uses the same INAS rule set as the career, but requires a different aid processing rule set, populate only the Aid Processing Rule Set field on this page. For Pell Grant Awarding purposes, you might consider creating unique Pell Calculation Rule Sets by Academic Program. For example, if an Academic Program supports a Leading Summer term, you might create a unique Pell Calculation Rule Set that distinguishes it from an Academic Program that doesn't support a Summer term.

Click the Copy button to access the Copy Programs for Aid Year and Career page and copy program-level defaults from one combination of academic institution, aid year, and career to another.

See Also

[Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Listing Valid Careers for the Aid Year, page 24](#)

[Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13](#)

Associating Careers with School Codes

Access the Careers For School Codes page (Set Up SACR, Product Related, Financial Aid, Aid Year, Careers for School Codes).

Careers For School Codes

Academic Institution: PSUNV PeopleSoft University

Aid Year 2009 Financial Aid Year 2008 - 2009 [Copy](#)

School Cd: 001315 PeopleSoft University

Academic Career		Find View All	First	1-5 of 8	Last
BUSN	Graduate Business				
CNED	Continuing Education				
GRAD	Graduate				
LAW	Law				
MEDS	Medical School				

Careers For School Codes page

Aggregate Aid processing uses this information about school codes and careers to track a student's financial aid history at your institution. The loan system uses this information to create loan institution records during setup.

Academic Career Select an academic career that is valid for the displayed aid year and school code. You can select only academic careers that you have defined as valid for the displayed aid year on the Valid Careers for Aid Year page.

Copy Click this button to access the Copy Careers for School Code page and copy valid careers from one combination of academic institution, aid year, and school code to another.

Defining Valid Terms for Careers

Access the Valid Terms for Careers page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Terms for Careers).

Valid Terms for Careers

Academic Institution: PSUNV

Aid Year: 2009 Financial Aid Year 2008 - 2009

Academic Career: UGRD Undergraduate

Valid Terms for Career				Find View All	First	1-3 of 9	Last
*Term:	0627	Descr:	2009 Summer Qtr	Short Desc:	2009 SmQt		
Award Period:	Non Std	Loan Period Start:	06/20/2009	Loan Period End:	08/14/2009		
*Term:	0625	Descr:	2009 Summer	Short Desc:	2009 Sum		
Award Period:	Non Std	Loan Period Start:	05/23/2009	Loan Period End:	08/14/2009		
*Term:	0622	Descr:	2009 Spring Qtr	Short Desc:	2009 SpQt		
Award Period:	Academic	Loan Period Start:	03/28/2009	Loan Period End:	06/05/2009		

Valid Terms for Careers page

Defining the valid terms for each financial aid career provides the system with general guidelines for awarding and processing financial aid within the academic year.

Term

Select a term for which financial aid is awarded. Values include only the terms identified in the Term/Session Table (TERM_TABLE) for the career. After you enter a term value and exit the field, the Descr and Short Desc fields are populated automatically. These values are defined on the Term Values Table page (TERM_VALUES_XREF).

Note. FA Term uses the valid careers for aid year and valid terms for career setup tables to determine which aid year a term should be linked to. If you set up future terms, you must set up the corresponding aid year for those future terms. For example, if you had not set up 2006-2007 and were to run FA Term only for 2005-2006, the system would not recognize a term outside of the 2005-2006 academic/aid year.

Award Period

Indicates a term or set of terms associated with a period of enrollment for the purposes of need analysis and awarding. The term's award period supplements the EFC adjustment calculation as it relates to calculations that are not nine-month calculations. Packaging uses the award period to apply active or passive mode correctly during multiple award period processing. It is also used to manage the type of data to extract for the financial aid notification (FAN) letter.

Academic: Indicates that the term is part of the standard academic year, and is generally associated with the nine-month EFC calculation. This is the default value.

Non Std (nonstandard): Indicates that the term is a nonstandard term, such as an inter-session or summer term, and is generally associated with calculations that are other than nine-month EFC calculations.

Loan Period Start and Loan Period End

Indicates the dates that the loan period begins and ends. Student Records supplies default dates. These dates are required for each term to build a valid loan period dynamically. 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. When the Loan Origination record is built, the system calculates the loan period using the earliest loan period start date and latest loan period end date from the terms contained within the disbursement plan assigned to the loan award.

You can change period start and end dates at a student's individual loan origination level.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions"

[Chapter 33, "Managing Special Cases in Packaging," Understanding Passive/Active Mode in Multiple Award Period Processing, page 1156](#)

Assigning Financial Aid Career Types

Access the Financial Aid Career Type page (Set Up SACR, Product Related, Financial Aid, Financial Aid Terms, Define Career Types, Financial Aid Career Type).

Financial Aid Career Type		
Academic Institution:	PSUNV	PeopleSoft University
Academic Career:	UGRD	Undergraduate
FA Career Type Find View All First ◀ 1 of 1 ▶ Last		
Effective Date:	01/01/1900	Status: Active *FA Career Type: <input type="text" value="Undergradu"/>

Financial Aid Career Type page

When a student has more than one academic career, Financial Aid Term statistics are combined for all academic careers that have the same financial aid career type. For example, if a student has two academic careers (undergraduate engineering and undergraduate) and the FA Career Type field is *Undergraduate* for both academic careers, Financial Aid Term statistics are combined for the two academic careers.

If the FA Career Type field is *not* the same for a student with multiple academic careers, the academic career primacy rules are used. The term statistics for the academic career with the higher primacy is used for the FA Term data. The term statistics for the academic career with the lower primacy are defined as other; you can view these statistics on the FA Term Other Units page.

The FA Career Type field is located on ACAD_CAR_TBL.

Note. If you do not assign financial aid career types, the system associates all academic careers with the *Undergraduate* career type by default and combines statistics for all your academic careers.

FA Career Type

Select the financial aid career type to associate with the displayed academic career. You have only one active effective-dated row for each academic career. If you need to change the career type associated with the academic career, select a different value in this field. The Financial Aid system delivers the following translate values; you can add additional translate values:

E: Extended Education.

G: Graduate.

P: Professional.

U: Undergraduate. This is the default value.

Activating an Aid Year for a Student

This section discusses how to:

- Activate an aid year manually.
- Activate an aid year in batch.

Loading electronic data for the student automatically activates the student for the aid year. If you do not expect to use electronic data from an outside source such as ISIR or PROFILE, you can manually activate an aid year for an individual student or a group of students.

For example, if you need to post external awards, such as outside scholarships or Student Financial transactions, before ISIR or PROFILE activity, you can activate the aid year using the batch process for that selected population.

Pages Used to Activate an Aid Year for a Student

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Aid Year Activation	AID_YEAR_ACTIVATE	Financial Aid, Aid Year Activation, Manage Financial Aid Years, Student Aid Year Activation	Activate an aid year for a student manually.
Aid Year Activate	SFA_RUNCTL_ACTADYR	Financial Aid, Aid Year Activation, Process Financial Aid Years, Aid Year Activate	Activate an aid year for a student in batch.

Activating an Aid Year Manually

Access the Student Aid Year Activation page (Financial Aid, Aid Year Activation, Manage Financial Aid Years, Student Aid Year Activation).

Student Aid Year Activation

Fatana Abarta
FA0001

Student Active for					Customize	Find	First	1-9 of 9	Last
	*Institution	Description	*Aid Year	Description					
1	PSUNV	PeopleSoft University	2007	Financial Aid Year 2006 - 2007	+				
2	PSUNV	PeopleSoft University	2006	Financial Aid Year 2005-2006	+				
3	PSUNV	PeopleSoft University	2005	Financial Aid Year 2004-2005	+				
4	PSUNV	PeopleSoft University	2004	Financial Aid Year 2003-2004	+				
5	PSUNV	PeopleSoft University	2003	Financial Aid Year 2002-2003	+				
6	PSUNV	PeopleSoft University	2002	Financial Aid Year 2001-2002	+				
7	PSUNV	PeopleSoft University	2001	Financial Aid Year 2000-2001	+				
8	PSUNV	PeopleSoft University	2000	Financial Aid Year 1999-2000	+				
9	PSUNV	PeopleSoft University	1999	Financial Aid Year 1998-1999	+				

Student Aid Year Activation page

Use this page to create and manage aid years for an individual student ID. After you add a row, enter an aid year to activate and save your work.

Important! Before activating an aid year for a student, ensure that the student has personal, biographical, and demographic data in PeopleSoft Enterprise Campus Community. To verify this information or add the student, select Campus Community, Personal Information, Biographical.

Activating an Aid Year in Batch

Access the Aid Year Activate page (Financial Aid, Aid Year Activation, Process Financial Aid Years, Aid Year Activate).

Aid Year Activate

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Population Selection

Selection Tool: PS Query

Query Name: [Launch Query Manager](#)

Select Values to Update

Academic Institution: PeopleSoft University

Aid Year: 2009

Aid Year Activate page

Use the Aid Year Activate process to create an aid year for a group of students.

Population Selection

Selection Tool Select from *Equation Engine*, *PS Query*, or *External File*. Additional parameters are displayed for your selected tool.

Query Name Appears only when *PS Query* is selected. Select a population selection query that joins with the bind record SFA_ACTADYR_BND.

Select Values to Update

Academic Institution Enter the academic institution that the student is attending during the aid year.

Aid Year Enter the aid year that you want to activate for the student.

Reviewing NSLDS Codes

To set up NSLDS codes, use the Maintain NSLDS Codes component (NSLDS_CODES1).

This section discusses how to review the NSLDS Code Table.

The U.S. Department of Education defines the NSLDS loan status codes, which are updated each year in a regulatory release. The NSLDS database is maintained by the Department of Education and provides a student's complete Pell Grant and loan history and their current status. You can view NSLDS status codes in the View NSLDS History component.

Page Used to Review NSLDS Codes

Page Name	Definition Name	Navigation	Usage
NSLDS Code Table	NSLDS_CODE_TABLE	Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain NSLDS Codes, NSLDS Code Table	Review the NSLDS codes.

Reviewing the NSLDS Code Table

Access the NSLDS Code Table page (Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain NSLDS Codes, NSLDS Code Table).

NSLDS Code Table						
Customize Find View All First 1-10 of 51 Last						
	*NSLDS Status Code	*NSLDS Code Type	*Description	*Short Description	Title IV Eligible	
1	AE	Default	Permanently assigned to ED	PrmAsgn ED	<input checked="" type="checkbox"/>	+ -
2	AL	General	Abandoned Loan	Abandoned	<input checked="" type="checkbox"/>	+ -
3	BC	Default	Bankruptcy-Discharged	Bnkprt-Dis	<input checked="" type="checkbox"/>	+ -
4	BK	General	Bankruptcy Claimed, Active	Bankruptcy	<input checked="" type="checkbox"/>	+ -
5	CA	Cancelatn	Cancelled	Cancelled	<input checked="" type="checkbox"/>	+ -
6	CS	General	Closed School Discharge	Closed Sch	<input checked="" type="checkbox"/>	+ -
7	DA	Deferment	Deferred	Deferred	<input checked="" type="checkbox"/>	+ -
8	DB	Default	Default-Bnkprt-Active(Ch13)	Dflt-Bnkr2	<input type="checkbox"/>	+ -
9	DC	Default	Defaulted-Compromised	Dflt-Comp	<input checked="" type="checkbox"/>	+ -
10	DD	Default	Defaulted, then died	Dflt-Died	<input checked="" type="checkbox"/>	+ -

NSLDS Code Table page

NSLDS Status Code (National Student Loan Data System status code) Displays the two-letter code defined by the U.S. Department of Education.

NSLDS Code Type (National Student Loan Data System code type) Indicates the type of action associated with the status code. A status code can have a type of *Cancelatn* (cancellation), *Default*, *Deferment*, or *General*. This field is for informational purposes only.

Title IV Eligible

Indicates whether the NSLDS status code affects eligibility for Title IV aid. Review the default values to determine whether they apply to your institutional business rules. If this check box is selected, the student is still eligible for Title IV aid when the NSLDS status code appears on his or her database record. If the check box is cleared, the student is not eligible for Title IV aid when the NSLDS status code appears on their database record. If the check box is unavailable, the NSLDS status code has no effect on eligibility.

This check box is for informational purposes only; no processing is associated with it.

Note. You can change the NSLDS Code Table if you find an error or if the U.S. Department of Education makes midyear regulatory changes.

Defining Aid Year Rollover

To set up aid year rollover, use the Term Values Cross Reference (TERM_VALUES_XREF) and Aid Year Setup (AID_YEAR_SETUP) components.

This section provides an overview of aid year rollover and discusses how to:

- Set up term values cross-reference.
- Set up aid year rollover.
- Review table rollover options.

Understanding Aid Year Rollover

This section addresses many processing setup tables that you encounter throughout PeopleBooks. After your set up your source processing for the award year, you can use aid year rollover to set up award year processing on an annual basis.

Aid year rollover provides an automated way for you create aid-year-specific setup tables from year to year. Two pages support this process: Aid Year Setup and Term Values Cross Reference. You must follow three steps to initiate this process.

1. Run the Aid Year Setup process (FA_AID_YEAR) to create General Aid Year and Aggregate Aid Limit tables (AGGR_AID_TBL).
2. Populate the Term Values Cross Reference table (TERM_VALUES_XREF).
3. Run the Aid Year Setup process to create remaining tables that are eligible for this process.

You can use the Aid Year Setup page (RUNCTL_AID_YEAR) to define the setID, institution, and aid year that you want to copy from one aid year to the next. In addition, the system provides options for effective date usage, rollover for active or inactive rows, and a choice of tables to be copied forward to a target year.

The following dependencies are built into this process:

1. You must create or process General Aid Year tables first.
2. You can select General Aid Year and Aggregate Aid limits at the same time.

If you select both, the system always runs General Aid Year before Aggregate Aid Limits.

3. You cannot run General Aid Year or Aggregate Aid Limits if you have Term Value Cross Reference-dependent setup options activated.
4. All options listed below Term Values Cross Reference depend on setup of the Term Values Cross Reference table.
5. Term Values Cross Reference depends on Term Values and Term/Session setup by records.

This enables rollover to associate a term from the base year to a term in the target year.

6. You must run FA Term setup (RUN_CNTL_FATRMP) as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.

Many tables created subsequently use the FA Term tables created as prompt tables.

7. Budget Tables depend on FA Term table creation for career term values.
8. FA item types depend on aggregate aid limits.

If Aggregate Area is populated in FA Item Type (FINANCIAL_AID_ITEM) for source year, the system verifies that aggregate aid limits are set up for the target year. If the Aggregate Area is blank, the system bypasses the dependency. The rollover of disbursement IDs and disbursement split codes is included in FA Item Type tables setup.

9. Disbursement rules are keyed by FA Item Type and depend on FA Term and FA Item Types table creation.
10. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates.

Therefore, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.

11. Packaging table setup depends on the creation of the FA Item Types table.
12. Return of TIV depends on the creation of the Budget table.
13. Loan Tables depend on the creation of the FA Item Types table.
14. Pell payment depends on records setup of ACAD_CAR_TBL and ACAD_PROG_TBL.

Pages Used to Define Aid Year Rollover

Page Name	Definition Name	Navigation	Usage
Term Values Cross Reference	TERM_VALUES_XREF	Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference	Set up term value cross-reference to process all rollover options except for General Aid Year and Aggregate Aid Limits.
Aid Year Setup	RUNCTL_AID_YEAR	Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup	Create aid-year—specific setup tables from year to year.

Setting Up Term Values Cross Reference

Access the Term Values Cross Reference page (Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference).

Term Values Cross Reference

Aid Year: 2010 Federal Aid year 2009 - 2010

*From Term	Description	*To Term	Description		
0615	2009 Winter Qtr	0635	2010 Winter Qtr	+	-
0620	2009 Spring	0640	2010 Spring	+	-
0622	2009 Spring Qtr	0647	2010 Summer Qtr	+	-
0625	2009 Summer	0645	2010 Summer	+	-
0630	2009 Fall	0650	2010 Fall	+	-

Term Values Cross Reference page

Set up the Term Values Cross Reference page to process all options except General Aid Year and Aggregate Aid Limits. Confirm that your records department has set up term values for the target aid year being created and has also associated each term with the appropriate career in the Term/Session table. Term values that are set up in Cross Reference that do not exist in Student Records are not created for the tables being processed. Verify term setup in Student Records before you set up your Term Values Cross Reference.

From Term Enter the terms from your source year.

To Term Enter the terms to be created by associating them with the appropriate From Term value.

Setting Up Aid Year Rollover

Access the Aid Year Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup)..

Aid Year Setup

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Aid Year Criteria

*SetID	PSUNV	*Copy From Aid Year	2009
*Institution	PSUNV	*Copy To Aid Year	
<input checked="" type="checkbox"/> Override Aid Year		<input type="checkbox"/> Rollover Inactive Rows	

Target Year Effective Date Options

<input type="checkbox"/> Eff Date of Today	<input type="checkbox"/> Use Eff Date from Source Table
<input type="checkbox"/> Eff Date of 01/01/1900	

General FA Tables Setup

<input type="checkbox"/> Aid Year Tables	<input type="checkbox"/> Aggregate Aid Limit Tables
--	---

Term Values Cross Reference setup is required prior to updating the tables below

Additional FA Tables Setup

<input type="checkbox"/> FA Term Tables	<input type="checkbox"/> Budget Tables
<input type="checkbox"/> FA Item Type Tables	<input type="checkbox"/> Disbursement Rules Tables
<input type="checkbox"/> Packaging Tables	<input type="checkbox"/> Return of TIV Tables
<input type="checkbox"/> ISIR Tables	<input type="checkbox"/> Loan Tables
<input type="checkbox"/> PELL/ACG/SMART Tables	<input type="checkbox"/> Profile Tables

Aid Year Setup page

Note. You must perform a separate aid year rollover for each set of setID and institution combinations.

After selecting your rollover options, click the Run button to run the FA_AID_YEAR process.

Carefully review the message log generated by this process. Although you can access the message log several ways, to get additional details, click Process Monitor to locate the appropriate process instance for this process. Click Details and then click Message Log. For each process action, you can click Explain to review additional information about the action taken or the action that you might need to take.

Aid Year Criteria

SetID	Select the setID. In cases in which institution and setID are keys, the system rolls only those rows found that match on both the setID and institution. For example, the Loan Fee Table is keyed by setID and institution, so if you specify SetID = GLAKE Institution = PSUNV, the system does not create rows for SetID of PSUNV with Institution PSUNV for the aid year created by the process.
Institution	Select the institution to process the source year and copy to the target year.
Copy From Aid Year	Select the source aid year.
Copy To Aid Year	Select the target aid year.
Override Aid Year	<p>Select to override setup tables in the target year for which they might already be created. When you select this check box, the system rolls over a new record along with records that have already been rolled over. If you have updated the tables in the target year either manually or after you have run the aid year process, and you run aid year rollover again with this check box selected, the system overwrites the updated target data with source year data. If the check box is cleared and you have made changes to the source year data, the system does not roll these changes forward to the target year if the target table has already been created.</p> <p>The Override Aid Year option works differently for budgets. When you select the Budget Table option and Override Aid Year is not selected, the system rolls forward only new rows added in the source year to the target year. This way, data that has been rolled previously is preserved, and the system adds new source year data to it.</p>
Rollover Inactive Rows	Select to roll forward to the target year an inactive row if it is the latest row in the table being processed. If you select this option for disbursement rules or budgets, the system rolls forward any inactive row in the source year to the target year. The system assigns any inactive rows created in the target year an inactive status.

Target Year Effective Date Options

Eff Date of Today (effective date is today's date)	Select to insert the current date for all effective-dated rows created except for disbursement rules and budgets.
Use Eff Date from Source Table (use effective date from the source table)	Select to insert the date used in base year rows for all effective-dated rows created in the target year.

Eff Date of 01/01/1900 (effective date of January 1, 1900)) Select to (with the exception of disbursement rules and budgets) roll forward only the latest effective-dated row from the source year to the target year. The process rolls over rows to the new aid year using one of three effective-dated choices, and if applicable, existing sequence, process, criteria, and so on.

For disbursement rules and budgets, the process rolls forward all active rows and always uses the source date as the effective date. You must manually adjust these dates. For all options, the process does not roll over inactive rows unless you select the Rollover Inactive Rows option.

General FA Tables Setup

Aid Year Tables Select to move general Aid Year source tables to target year tables. You must run General Aid Year first.

Aggregate Aid Limits Select to move Aggregate Aid Limits source tables to target year tables. You can select Aggregate Aid Limits to run with General Aid Year tables. If you select both, the system always runs General Aid Year tables before Aggregate Aid Limits.

Additional FA Tables Setup

Before you can update any of the following tables, you must set up the Term Values Cross Reference page (Set Up SACR, Product Related, Financial Aid, Aid Year, Term Values Cross Reference).

FA Term Tables (financial aid term tables) Select to move FA Term source tables to target year tables. Run FA Term setup as a single option to check and update the tables as needed for the target year and then proceed with the remaining options.

Budget Tables Select to move Budget source tables to target year tables. Budget tables depend on FA Term table creation for career term values.

FA Item Type Tables (financial aid item type tables) Select to move FA Item Type source tables to target year tables. FA Item Types depend on Aggregate Aid Limits. If Aggregate Aid Limits do not exist in the source and target year, the system bypasses the dependency. The rollover of disbursement IDs and split codes is included in FA Item Type tables setup.

Disbursement Rules Tables Select to move Disbursement Rules source tables to target year tables. Disbursement Rules are keyed by FA Item Type and depend on FA Term and FA Item Type table creation. Disbursement Rules setup copies all effective-dated rows from the source year using the same effective dates. Thus, you must adjust the effective dates for the new aid year before you can run the authorization and disbursement processes. Adjust the effective dates in the Disbursement Authorization Calendar, Disbursement Rules: Global, and Disbursement Rules: Item Type components.

Packaging Tables Select to move Packaging source tables to target year tables. Packaging table setup depend on FA Item Types table creation.

Return of TIV Tables	Select to move Return of TIV source tables to target year tables. Return of TIV depends on Budget Table creation.
ISIR Tables (Institutional Student Information Record tables)	Select to move ISIR source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.
Loan Tables	<p>Select to move Loan source tables to target year tables. Loan tables depend on FA Item Types table creation. You cannot run this process without first setting up the Term Values Cross Reference.</p> <p>Loan Tables includes the CL4 Loan Destination Profile tables. Because CL4 Loan Destination Profiles cannot be deleted or inactivated, the process copies data to the target year even though loan agencies associated with the destination might no longer be valid, making the destination itself invalid.</p> <p>To avoid copying invalid CL4 Loan Destination Profiles, the process compares each loan agency (Lender/Guarantor/Servicer) associated with the loan destination against Loan Agency Defaults setup. If any loan agency OPEID from the CL4 Loan Destination Profile matches an OPEID setup on the Loan Agency Defaults page, the destination is not copied to the target year.</p> <hr/> <p>Note. During the Aid Year Setup process, the Loan Agency Default tables are copied before the CL4 Loan Destination Profile tables are copied. This enhancement uses Loan Agency Default values from the target year when comparing OPEIDs.</p> <hr/>
PELL/ACG/SMART Tables (Pell, Academic Competitiveness Grant , and National Science and Mathematics Access to Retain Talent grant tables)	Select to move Pell Payment source tables, ACG/SMART Setup tables, and the HERA Academic Level Setup page to target year tables. Pell Payment depends on Records setup of ACAD_CAR_TBL and ACAD_PROG_TBL. You cannot run this process without first setting up the Term Values Cross Reference.
Profile Tables	Select to move PROFILE source tables to target year tables. You cannot run this process without first setting up the Term Values Cross Reference.

Reviewing Table Rollover Options

The following tables are eligible for rollover for the new year. The order in which they appear for each setup option is the processing order.

General Aid Year

This table displays rollover options for general aid year:

Record Name	Page Name
FED_AID_YR_TBL	Federal Aid Year Table
AID_YEAR_TBL	Aid Year Table

Record Name	Page Name
AID_YEAR_CAREER	Valid Careers for Aid Year
AID_YEAR_PROG	Valid Programs for Aid Year
TIV_SCHOOL_TBL	School Code Table
INST_SCHOOL_CDS	School Codes for Institution
SCHOOL_CAREER	Careers for School Codes
FA_APP_SRC_TYP	Application Source Rank
FA_APP_SRC_TBL	Application Source Rank
FA_APP_SRC_RANK	Application Source Rank
SS_FA_INSTALL	Self-Service Options

Aggregate Aid Limits

This table displays rollover options for aggregate aid limits:

Record Name	Page Name
AGGR_LIMIT_TBL	Aggregate Aid Limits
AGGR_LVL_LIMITS	Aggregate Aid Limits

FA Term

This table displays rollover options for FA Term:

Record Name	Page Name
FATRMP_CAREER	FA Term Setup
FATRMP_CAR_TRM	FA Term Setup
AID_YR_CAR_TERM	Valid Terms for Career

Budgets

This table displays rollover options for budgets:

Record Name	Page Name
RUN_CNTL_BDGT_P	Budget Assign Run Control
BUDGET_CATG_TBL	Budget Categories
BDGT_ASIGN_CNTL	Budget Assignment
RUN_CNTL_FABDGT	Budget Assign Run Control
BDGT_ASIGN_TERM	Budget Assignment
BUDGET_ITEM_TBL	Budget Items
BUDGET_GRP_TBL	Budget Groups
BUDGET_ITEM	Budget Items
BDGT_TREE_CATG	Budget Trees
BDGT_FORMULA_TYP	Budget Formulas
BDGT_FORMULA_TBL	Budget Formulas
BDGT_FORMULA_DFN	Budget Formulas
BDGT_TREE_TBL	Budget Trees
BDGT_FRMULA_GRP	Budget Formulas
BDGT_ASIGN_CATG	Budget Assignment

FA Item Type Tables

This table displays rollover options for FA item types:

Record Name	Page Name
ITEM_TYPE_FA	Financial Aid Item Types
ITEM_TYPE_FISCL	Fiscal Item Type
ITM_TP_TERM_LMT	Financial Aid Item Types
LN_FEE_TBL	Loan Fee Table
ITEM_TYP_FA_FEE	Financial Aid Item Types
DISB_PLAN_TBL	Disbursement Plan Table

Record Name	Page Name
DISB_ID_TBL	Disbursement ID Table
DISB_SPLIT_CD	Disbursement Split Codes
DISB_ID_SPLIT	Disbursement Split Code Formulas
ITEM_TP_FA_DISB	Financial Aid Item Types
AWD_MESSAGE_TBL	Award Messages

Disbursement Rules

This table displays rollover options for disbursement rules:

Record Name	Page Name
DISB_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_TBL	Disb/Authorization Calendar
AUTH_CAL_DATA	Disb/Authorization Calendar
DISB_CAL_DATA	Disb/Authorization Calendar
DISB_RULE_GLB	Disbursement Rules Global
DISB_RULE_SRV	Disbursement Rules Global
DISB_RULE_ITM	Disbursement Rules Item Type
DISB_RULE_CHK	Disbursement Rules Item Type
DISB_RULE_ITS	Disbursement Rules Item Type
DISB_RULE_USR	Disbursement Rules Global
DISB_RULE_ITU	Disbursement Rules Item Type
DISB_RULE_TRK	Disbursement Rules Global
DISB_RULE_ITK	Disbursement Rules Item Type

Packaging

This table displays rollover options for packaging:

Record Name	Page Name
AWD_ADJ_RSN_TBL	Award Adjustment Reasons
FA_INST_DEFN	Institutional Mass Packaging
FA_INST_CRIT	Institutional Mass Packaging
FA_INST_CRITLST	Institutional Mass Packaging
PKG_RTNG_CMP_TBL	Packaging Rating Components
PKG_EQUITY_LMT	Pkg Equity Item Types
PKG_EQUITY_ITM	Pkg Equity Item Types
PKG_REL_ITM_TBL	Pkg Related Item Type Group
PKG_REL_ITM_TYP	Pkg Related Item Type Group
PKG_PLAN_TBL	Packaging Plan
PKG_RULE_TBL	Packaging Plan
FA_BPKG_DEFN	Mass Packaging Definition
FA_BPKG_CRIT	Mass Packaging Definition
FA_BPKG_CRITLST	Mass Packaging Definition
RSTRC_AID	Restricted Aid Table
RSTRC_AID_ORG	Restricted Aid Table
RSTRC_AID_COM	Restricted Aid Table
RSTRC_AID_MEM	Restricted Aid Table

Return of Title IV

This table displays rollover options for return of Title IV:

Record Name	Page Name
RTRN_TIV_SETUP	Return of TIV RULES
RTRN_TIV_SETUP0	Return of TIV RULES
RTRN_TIV_SETUP2	Return of TIV RULES

Record Name	Page Name
RTRN_TIV_SETUP3	Return of TIV RULES

ISIR

This table displays rollover options for ISIR:

Record Name	Page Name
ISIR_SRCH_ADD	ISIR Data Load Parm
ISIR_SRCH_PRM	ISIR Data Load Parm
ISIR_INST_CNTRL	ISIR Data Load Parm
INAS_FM_ASMPTN	INAS Assumption Codes

Loans

This table displays rollover options for loans:

Record Name	Page Name
LN_TYPE_TBL	Loan Type Table
LN_TO_NSLDS_TYP	Loan Type Table
LN_ITEM_TBL	Loan Type Table
LN_RPT_ITEM	Loan Report Definitions
LN_PNOTE_TBL	Loan Type Table
LN_RPT_COL	Loan Report Definitions
LN_ACTNTYPE_TBL	Loan Action Code Table
LN_ACTN_PRG_TBL	Loan Action Code Table
LN_ACTNMSG_TBL	Loan Action Code Table
LN_ACTNCD_TBL	Loan Action Code Table
LN_DESTPROF_TBL	Loan Destination Profile
LN_DEST_CATGRY	Loan Destination Profile
LN_DEST_EDIT	Loan Destination Profile

Record Name	Page Name
LN_INSTUTN_TBL	Loan Institution
LN_INSTN_CNTRACT	Loan Institution
LN_INST_DEST	Loan Institution
LN_EDIT_DFLT	Loan Edit Defaults
LN_EDITDFLT_DTL	Loan Edit Defaults
LN_RPT_PKG	Loan Report Packages
LN_RPT_LNK02	Loan Report Packages
LN_DL_CHG_XREF	Direct Lending Change fields
LN_DL_INST_PARM	Loan DL Inst Change Hold/Susp
LN_PN_TYPE_TBL	DL Serial Prom Note Table
LN_EDIT_TBL	Loan Edits/Messages
LN_AGENCY_DFLT	Loan Agency Defaults
SFA_LNDR_SEL	Lender Select Setup
SFA_LNDR_DTL	Lender Select Detail
SFA_LN_DTL	Lender Select Detail
SFA_LN_CNLS_SU2	Loan Item Type

Pell/ACG/SMART Tables

This table displays rollover options for Pell payment , ACG grant, and SMART grant:

Record Name	Page Name
PELL_PMT_OPTION	Pell Payment Setup
PELL_PMT_CAREER	Pell Payment Detail
PELL_ATTENDING	Pell ID Attending
PELL_COMNT_TBL	Pell Comment Codes
SFA_ASG_PARMS	ACG/SMART Processing Options

Record Name	Page Name
SFA_ASG_SETUP	ACG/SMART Reporting Options
SFA_ASG_HS_PROG	ACG State Program Codes
SFA_ASG_CIP_CD	Eligible CIP Codes for SMART
SFA_ASG_AL_TBL	HERA Academic Level Rules Setup

PROFILE

This table displays rollover options for PROFILE:

Record Name	Page Name
INAS_IM_ASMPTN	INAS Assumption Codes
INST_LOAD_CNTRL	PROFILE Data Load Params

Chapter 3

Setting Up Financial Aid Terms

This chapter provides an overview of financial aid terms and discusses how to:

- Define the parameters for creating financial aid terms.
- Set up cost codes.

Understanding Financial Aid Terms

A financial aid term is a combination of a period of time that your school determines as an instructional accounting period and an academic career. Your institution defines the financial aid terms during the setup process. Because some institutions might not offer financial aid for all of their academic terms, only the terms eligible for financial aid are set up for each financial aid career. For example, if your institution does not offer financial aid for an intersession term, you would not set up the intersession term as a valid term for a career. To receive financial aid, a student must be enrolled in a valid program leading to a degree or certificate and must meet satisfactory academic progress standards.

Financial Aid enables you to maintain actual or projected enrollment data for a specific financial aid term for a student. Because PeopleSoft Enterprise Campus Solutions also allows concurrent term enrollments in different academic careers and academic programs, the information maintained using the financial aid term is then used to determine a student's financial aid load, level, budget, and award. A financial aid term record is built for only one combination of career and program. If students are enrolled in multiple careers or programs, then career primacy information is used to determine which combination of career and program information is built in the financial aid term. The FA Term Other Units page displays units taken for the other career or program. Use the FA Term component to provide student term data for financial aid processing. The system tracks academic detail for each financial aid applicant on the financial aid term table. This information includes the student's career, primary program, academic plan, enrollment, academic level and standing, and financial aid standing. The financial aid office uses this data to validate a student's eligibility to receive aid, to establish a student's budget, and to proceed toward the Awarding process.

Many downstream financial aid processes, such as building student budgets, awarding students, originating student loans, requesting Pell funds, and disbursing aid to students, depend on having the financial aid term information built. Financial aid terms can be built with specific enrollment data or with projected data. Enrollment data is the enrollment statistics for a specific term from PeopleSoft Enterprise Student Records. Projected data is projected statistics that come from many of the academic setup tables, such as the Level/Load Rules component, the Session Table page, the Academic Career Table component, and the Academic Program Table component. You must understand these tables and be familiar with the information that they contain to ensure the proper use and building of the financial aid terms.

The information that you enter on the FA Term Setup page determines whether the financial aid terms can be built using only enrollment data or changes to enrollment data (updates), or whether they can be built using projected data in addition to enrollment data (updates and projections). To provide an additional control on what type of data to use when building the financial aid terms, you can direct the financial aid term build process to use either updates and projections or updates only.

Defining the Parameters for Creating Financial Aid Terms

To set up financial aid terms, use the Set Up Financial Aid Term component (FA_TERM_SETUP).

You identify the terms that you want the financial aid term process to build for a student. Because your institution might not offer financial aid for all of its academic terms, you must specify which academic terms are also financial aid terms on the Valid Terms for Career page.

This section discusses how to set up financial aid terms.

Page Used to Define the Parameters for Creating Financial Aid Terms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Term Setup	RUN_CNTL_FATRMP	Set Up SACR, Product Related, Financial Aid Term, Setup Financial Aid Term, FA Term Setup	Establish the processing rules for building financial aid terms for academic careers.

Setting Up Financial Aid Terms

Access the FA Term Setup page (Set Up SACR, Product Related, Financial Aid Term, Setup Financial Aid Term, FA Term Setup).

FA Term Setup

Institution: PSUNV PeopleSoft University **Aid Year:** 2005

Career Information Find 1-2 of 2

***Academic Career:** GRAD Graduate

Select	Term	Session	Weeks of Instruction	Census Dt	FA Census Dt	Lock
<input type="checkbox"/>	0545 2005 Summer	12W	12	06/20/2005		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	0542 2005 Spring Qtr	10W	10	04/25/2005		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0540 2005 Spring	1	15	02/21/2005		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	0535 2005 Winter Qtr	10W	10	01/31/2005		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	0532 2004 Fall Qtr	1	10	10/04/2004		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0530 2004 Fall	1	15	09/27/2004		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0524 2004 Summer Qtr	8W1	8			<input checked="" type="checkbox"/>
<input type="checkbox"/>	0522 2004 Summer	12W	12			<input checked="" type="checkbox"/>

FA Term Setup page

Enter a row for *every* academic career that you assign.

Select Select the check box to the left of each term to use in the automatic financial aid term build process when building terms in projection.

Term Displays all of the terms that you associated with this combination of aid year and academic career on the Valid Terms for Careers page. If you do not select a term on this page, no FA Term information is built for the term when building terms in projection. If enrollment data exists for a term, that term is always built, even if the term is not selected on this page. During packaging, if your disbursement plan covers a term that does not have FA Term information, the system generates an error during the validation process.

Session Displays the default session, such as a regular academic session or an Open Entry or Open Exit session, as established on the Session Table page in the Term/Session Table component. If your institution has more than one session for a term, this page displays only the default session.

Weeks of Instruction Displays the number of weeks of instruction for the default session, established on the Session Table page in the Term/Session Table component.

Census Dt (census date) Displays the date used to capture the student's enrollment for the term, established in the Census Date field on the Session Table page in the Term/Session Table component. If no FA census date is defined for the term on the FA Term Setup page, the financial aid term build process uses this census date to determine when to stop building terms with projected data and when to discard all terms built with projected data.

FA Census Dt (financial aid census date) To stop building terms with projected data, and to discard all terms built with projected data after a certain date in the term, enter that date in this field. The term can no longer be built as a projection after the date that you enter in this field, and any projections for that term become inactive.

Lock

This lock is for census date activation. Select this check box to lock certain student enrollment fields as of either the census date or the financial aid census date. If both dates exist, the financial aid census date is used. If you run the financial aid term build process on or after the census date, the system does not change the data in these fields. You can override this lock at the student level on the financial aid term component. The fields that are locked are FA_LOAD (Financial Aid Load field on the Acad Level page) and UNT_TAKEN_FA (Taken field in the Term column on the Statistics page) on the FA Term table. The BUDGET_REQUIRED field (on the Financial Aid Info page) is changed to *No Assign* after the census date.

If the term has no census date or financial aid census date, this check box has no effect. If the check box next to the term is cleared, then the Lock check box has no effect, even if it is selected.

Setting Up Cost Codes

This section discusses how to define cost codes.

Pages Used to Set Up Cost Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Cost Code Setup	CAN_COST_CODE	Set Up SACR, Product Related, Financial Aid, Canadian Application Processing, CNAS Cost Code, Cost Code Setup	Define cost codes and the number of financial aid weeks for each combination of institution, aid year, career, academic program, loan year, and term.
Copy Cost Code	COST_CODE_COPY_SEC	Click the Copy Cost Code button on the Cost Code Setup page.	Copy cost codes from a previous aid year or another career for the current aid year and career that you are setting up.

Defining Cost Codes

Access the Cost Code Setup page (Set Up SACR, Product Related, Financial Aid, Canadian Application Processing, CNAS Cost Code, Cost Code Setup).

Cost Code Setup

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2005 Financial Aid Year 2004-2005

Academic Career: UGRD Undergraduate Copy Cost Codes

Sixty Percent Point in Time is required. Customize | Find | View All | First 1 of 1 Last

	*Academic Program	*Loan Year	*Term	Description	FA Weeks	Start Date	End Date	Cost Code	Regulated Program
1	LAU	0	0540	2005 Spring		01/24/2005	05/08/2005		

Cost Code Setup page

Canadian institutions use cost codes to report financial aid calendars, length of financial aid award periods, and cost of attendance information to the Canada Student Loan program. The FA Term build process uses this information to determine the student's cost code and financial aid number of weeks and then populates the new fields on the student FA Term page.

Academic Program Select an academic program for which you want to define a cost code.

Loan Year Select a year in school to associate with the academic program for the cost code. Values are:

- 0: First Year, Never Attended
- 1: First Year, Previously Attended
- 2: 2nd Year
- 3: 3rd Year
- 4: 4th Year
- 5: 5th Year
- A: 1st Year Graduate
- B: 2nd Year Graduate
- C: 3rd Year Graduate
- D: 4th Year or more Graduate
- G: Graduate/Professional

FA Weeks (financial aid weeks) Enter the number of weeks in the term for financial aid purposes. The number of weeks for financial aid can be different from the number of weeks in the term.

Start Date and End Date Enter the dates that the instructional period begins and ends for financial aid purposes. This field is populated by default with the term start date and term end date from the Term/Session Table component. The start and end dates for financial aid can be different from the start and end dates of the term.

Cost Code Enter the cost code to associate with this combination of career, program, and year in school.

Regulated Program

Indicate whether the program is regulated by Ontario Student Assistance Program (OSAP). Regulated programs might be subject to tuition and fee caps and therefore handled differently in the Ontario Student Loan (OSL) assessment of a student's contribution and need. Values are:

N: Nonregulated program

R: Regulated program

Copy Cost Code

Click to access the Copy Cost Code page and copy the list of cost codes from an established combination of institution, aid, year, and career to the current combination that you are setting up.

Chapter 4

Setting Up Student Budgets

This chapter provides an overview of student budgets setup and discusses how to:

- Define budget components.
- Create budget groups.
- Prepare for background budget assignment.

Understanding Student Budgets Setup

At the beginning of the aid-processing year, you create budgets that detail the cost of attendance (COA) for each term a student is enrolled. The COA is an estimate of a student's educational expenses for the period of enrollment. The budget helps establish a student's need (COA minus the student's expected family contribution), which permits the financial aid office to award need-based aid.

This section discusses:

- Budget components.
- Budget assignment formulas.

Budget Components

To create budgets, you first create budget categories—budget components such as tuition, housing, books, transportation, and fees. Then you create individual budget items within each category. Budget items have different budget amounts to account for different student needs. For example, within the housing budget category, you might have budget items for students living with parents or relatives, living on campus, and living off campus. The amount for each item might differ depending on whether the student is enrolled part time or full time. After you define budget items, you define criteria for determining which budget item within a budget category a student is assigned using budget formulas and budget trees.

After defining budget components, you can create predefined budgets to suit groups of similar students, such as undergraduate freshmen or married graduate students. These predefined budgets are budget groups and they can be detailed or generic. Detailed budget groups permit you to assign budgets to students by using predefined budget categories, budget items, and budget amounts. Alternatively, generic budget groups permit you to have the system determine the student's budget by using predefined budget categories along with budget formulas and budget assignment controls. When you use generic budget groups, the system assigns budget amounts to the student by invoking budget formulas tied to budget categories and determining which criteria the student meets. You can use generic budget groups when creating students' budgets either in batch or online.

To create student budgets in batch or online for an individual student, the system can use either the same rules as in batch or the predefined budget groups. In the Assign Budgets component (BUDGET_ASSIGNMENT), establish the career and term of a budget, and then list the budget categories that should be assigned to students for each term. If you define generic budget groups, you can use a generic budget group to assign categories instead of adding budget categories individually. For background processing only, define the budget run control, which selects the careers and terms for which to assign budgets, as well as work table maintenance options.

Budget Assignment Formulas

Budget formulas and trees provide criteria for selecting which students receive a particular budget item. If you do not define a budget formula or tree for a budget item, students do not receive that budget item unless you assign it manually. Budget formula selection criteria are based on the values from selected database fields. Housing formulas, for example, could calculate various housing amounts for on-campus, off-campus, parent-supplied, and married housing.

Define a budget formula for all budget items that do not vary based on postal code (distance). To select budget items based on distance (such as transportation costs), use a budget tree.

Defining Budget Components

To set up budget components, use the Budget Categories (BUDGET_CATG_TBL), Budget Items (BUDGET_ITEM_TABLE), Budget Formulas (BUDGET_FORMULA), and Budget Trees (BUDGET_TREE_TBL) components. Use the BUDGET_ITEM_TABLE component interface to load the data into the tables for this component interface.

This section lists common elements and discusses how to:

- Define budget categories.
- Define budget items.
- Define budget formulas.
- Define budget formula groups.
- Define budget assignment trees.

Common Elements Used in This Section

Formula Number	Displays a system-generated number assigned to each formula that you add. Each effective-dated row has a separate sequence of formula numbers.
Processing Order	This order ranks each budget item relative to the other items within the budget category. The system evaluates the budget items against the student's record and assigns budget items in the order defined by this rank.
Amount	Displays the budget amount for the selected budget item code.

Pages Used to Define Budget Components

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Budget Categories	BUDGET_CATG_TBL	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Categories	Define the various components of your institutional budget, such as tuition, books, and transportation.
Copy Budget Category Data	BUDGET_CATG_COPY	Click the Copy Setup Data button on the Create Budget Categories page.	Copy setup data on the Create Budget Categories page from one combination of academic institution and aid year to another.
Create Budget Items	BUDGET_ITEM_TABLE	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Items, Create Budget Items	Define budget items, term amounts, and Pell annual amounts assigned to a student for each budget category.
Pell Adjustments	BUDGET_ITEM_SEC	Click the Pell Adjustments link on the Create Budget Items page.	Adjust the Pell budget using percentages based on the student's financial aid load value.
Copy Budget Item Data	BUDGET_ITEM_COPY	Click the Copy Setup Data button on the Create Budget Items page.	Copy information on the Create Budget Items page from one combination of academic institution, aid year, and budget item category to another.
Budget Formula	BUDGET_FORMULA	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Formulas, Budget Formula	Create formulas that define eligible students for a budget item.
Copy Budget Formula Data	BDGT_FORM_COPY	Click the Copy Setup Data button on the Budget Formula page.	Copy setup data on the Budget Formula page from one academic institution, aid year, and budget category combination to another.
Budget Formula Groups	BUDGET_FORMULA_GRP	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Formulas, Budget Formula Groups	Designate the student groups applicable to the formula in progress. For example, you can have special awarding considerations for your student athletes who are also honor students.

Page Name	Definition Name	Navigation	Usage
Create Budget Trees	BUDGET_TREE_TBL	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Trees, Create Budget Trees	Assign a particular detailed value, or tree node, to a budget item.

Defining Budget Categories

Access the Create Budget Categories page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Categories).

Create Budget Categories

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2005 Financial Aid Year 2004-2005

[Copy Setup Data](#)

*Category	Item Class	Pell Category	*Description	Short Desc		
ART	Institutn		Special Art Supplies	Art	+	-
BOOK	Federal	Books	Books and Supplies	Books	+	-
CHLD	Federal	Child Care	Dependent Child Care	Child Care	+	-
COMP	Institutn		Computer Required by Program	Computer	+	-
COUN	Institutn		Counseling & Psychological Ser	Counseling	+	-
DSBL	Federal	Disability	Disability Allowance	Disability	+	-
FEES	Federal	Tuition	Tuition and Fees	Fees	+	-
HSNG	Federal	Housing	Housing	Housing	+	-
LOAN	Federal	Loan Fees	Loan Fees	Loan Fees	+	-
MISC	Federal	Personal	Miscellaneous and Personal	Misc	+	-
TRIP	Institutn		Trip Required by Program	Trip	+	-
TRNS	Federal	Transport	Transportation	Transport	+	-
TUIT	Federal	Tuition	Tuition and Fees	Tuition	+	-

Create Budget Categories page

Category

Enter a four-character code for each budget component. All academic careers share budget categories.

You must create a tuition budget category called *TUIT* to select the Match Fees check box on the Disbursement Rules: Global - Indicators page. When you select this check box, the authorization process automatically checks for the amount of tuition using the TUIT budget category.

Item Class

The system calculates the federal COA and institutional COA (optional) by totaling the budget categories—and, therefore, budget items—designated for each COA. A budget category's item class designates whether the budget category contributes to the federal and institutional COA or contributes only to the institutional COA. The federal COA is the sum of budget amounts for budget categories designated as *Federal*. The institutional COA is the sum of budget amounts for budget categories designated as either *Federal* or *Institutional*. For example, books are a federal budget category and count towards both the federal COA and institutional COA, while a computer is an institutional budget category and counts only towards the institutional COA. Leave this field blank if the budget category does not contribute to either the federal or institutional COA.

Pell Category

This field is available only for budget categories with an item class of Federal. The Pell category associates this budget category (and the category's budget items) with the Pell budget (Pell Annual COA), the Pell Less Than Half-Time budget (Pell LTHT Annual COA), and Alternate Pell budget (Alternate Pell Annual COA). If a budget category does not count toward the Pell budget, Pell LTHT budget, or Alternate Pell budget, leave this field blank. Otherwise, select from the following:

Books: Designates the cost of books. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation.

Child Care: Designates dependent child care costs. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA (if allowed), and the Alternate Pell COA calculation.

Disability: Designates disability-related costs for a student. Budget items with this Pell category are included in the Pell COA calculation and Alternate Pell COA calculation.

Fees: Designates a fee charged by the institution. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation.

Housing: Designates housing costs. Budget items with this Pell category are included in the Pell COA calculation.

Loan Fees: Designates estimated loan fee costs if the student receives loans. Budget items with this Pell category are included in the Pell COA calculation.

Personal: Designates an estimated amount for miscellaneous personal costs. Budget items with this Pell category are included in the Pell COA calculation.

Transport: Designates transport costs. Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation.

Tuition: Designates tuition costs only (does not include student activity fees and other types of fees). Budget items with this Pell category are included in the Pell COA and Pell LTHT COA calculation and the Alternate Pell COA calculation.

Note. If your institution charges fees in lieu of tuition or charges enrollment-based fees in addition to tuition charges, assign these tuition fees a Pell category of Tuition. The alternate Pell cost of attendance is calculated by summing the budget items with Pell categories of Tuition, Child Care, and Disability.

Copy Setup Data

Click to access the Copy Budget Category Data page, from which you can copy the information from one combination of academic institution and aid year to another.

See Also

[Chapter 29, "Awarding Pell Grants," page 1029](#)

Defining Budget Items

Access the Create Budget Items page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Items, Create Budget Items).

Create Budget Items

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2005 Financial Aid Year 2004-2005

Budget Item Category: MISC Miscellaneous and Personal

Item Classification: Federal Pell Category: Personal

Copy Setup Data

Find | View All First 1 of 1 Last

*Budget Item Code: MISC01

*Description: Miscellaneous and Personal

*Budget Item Amount: 300.00 USD

Pell Annual Amount: 600.00

Pell Less Half Annual Amount:

Long Description: Miscellaneous and Personal Expenses

Short Description: MISC01

Budget Multiplier ☐

Create Budget Items page

You can have multiple budget items for each category. If the budget amounts within a category differ depending on the type of term, you must create a separate budget item for each term.

- Budget Item Code**

Enter a code to identify budget items within a category. For example, the Housing budget category could have separate budget items for students living on campus, off campus, with parents, and in married student housing.
- Budget Item Amount**

Enter the amount per term for this budget item. Financial aid budgets, except for Pell budgets, are term-specific, so each budget item should reflect the term amount for that budget item.

Budget Multiplier

Select to multiply the budget item amount by a student's value for a particular field. Then select a field from the available list. The system takes the budget item amount and multiplies it by the value of the budget multiplier field. The available budget multiplier fields are:

COURSE_LD_PCT
 FA_NUMBER_OF_WEEKS
 FA_TERM_EFFSEQ
 FA_UNIT_ANTIC
 FA_UNIT_COMPLETED
 FA_UNIT_CURRENT
 FA_UNIT_IN_PROG
 REFUND_PCT
 UNIT_TAKEN_FA
 UNIT_TAKEN_FA_CL
 WEEKS_OF_INSTRUCT

Use the budget multiplier to build budget items on a per unit or per week basis. For example, if you charge tuition based on the number of units that a student takes, you can enter the per unit amount as the budget item amount. Then select the Budget Multiplier check box and select a field that represents units (options include FA units taken, units anticipated, units in progress, and current units).

The budget multiplier can also reduce the budget item amount for students who are not taking a full load or who receive a refund. Because these field values are a percentage, they can reduce the budget item amount. For example, to adjust a books budget item based on the student's course load, you select the Budget Multiplier check box and select *COURSE_LD_PCT* as the multiplier. Full-time students would receive 100 percent of the budget item amount, three-quarter-time students would receive 75 percent, and so on.

Pell Annual Amount

Available only for budget categories assigned to a Pell category on the Create Budget Categories page. Enter the annual—not term—Pell budget for this item.

The budget multiplier does not affect the Pell annual amount.

Note. Because graduate students are not eligible for Pell Grants, leave this field blank for graduate students.

Pell Less Half Annual Amount

Available only for budget categories assigned to a Pell category on the Create Budget Categories page. Enter the annual—not term—Pell budget for this item. Displays the Pell amount for less than half-time enrollment.

Copy Setup Data

Click to access the Copy Budget Item Data page and copy the information on this page from one combination of academic institution, aid year, and budget item category to another.

Defining Budget Formulas

Access the Budget Formula page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Formulas, Budget Formula).

Budget Formula | Budget Formula Groups

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2005 [Copy Setup Data](#)

Category: ART Special Art Supplies

***Effective Date:** 11/13/2001 ***Status:** Active

Formula Detail

Formula Number: 1 ***Processing Order:** 1 **Amount:** 500.00

***Budget Item Code:** ARTF **Budget Multiplier:** ☐ **Multiplier Field:**

***Description:** Full Time Art Fees **Short Description:** Art Fees

Formula Definition

*Field Name	*Operation	*Field Value	AND/OR		
ACAD_CAREER	=	UGRD	AND	+	-
ACAD_PLAN	=	ART	OR	+	-
ACAD_PLAN	=	ARTHIST		+	-

Budget Formula page

Effective Date

The Effective Date field on this page dictates which effective-dated translate table to use when retrieving valid values for each Field Name used in the Formula Definition. For example, the U.S. Department of Education changed the Housing Code value for the 2009-2010 aid year as follows: 2 is With Parent and 3 is Off Campus. To accommodate this change, the Effective Date field on the Housing Type translate table was changed to 31-Oct-2009.

Note. Always review Budget formulas when valid field values are updated. A new effective-dated row may be necessary to use the proper field values.

Formula Detail

Budget Item Code

Select the budget item for which you are defining a formula.

Budget Multiplier

Selected if you selected it on the Create Budget Items page. The multiplier field that you selected also appears.

Copy Setup Data

Click to access the Copy Budget Formula Data page and copy setup data on the Budget Formula page from one academic institution, aid year, and budget category combination to another.

Formula Definition

Create a budget formula to define a student's eligibility for this item. For example, if the student must be an undergraduate, the field name would be `ACAD_CAREER`, the operation would be `=` (equals), and the field value would be `UGRD`.

Field Name	A set of predefined fields that enable you to compose selection criteria to assign budget items. The Values for Field Name subtopic lists the available values.
	Note. If you select <code>STDNT_GROUP</code> as the field name, use the Budget Formula Groups page to specify field values and operations for the <code>STDNT_GROUP</code> criteria.
Operation	Indicates the relationship between the field name and its field value used to select students. The Available Operations subtopic describes the functions of the available values.
Field Value	Select a field value that indicates the required value of the field from Field Name. The system displays only field values related to the selected field name.
AND/OR	Select an AND/OR connector to indicate that other field names, statements, or criteria must be included in this formula. For example, a student must be an undergraduate AND have full time enrollment for a book allowance; the graduate student must be a graduate AND be enrolled in fall OR spring terms to be eligible for a study trip allowance. If you create conditional statements, the system processes only simple OR statements. Each conditional statement must be mutually exclusive.
	Note. Do not select an AND/OR connector in the last row of your formula.

Values for Field Name

This table lists available field names from which you compose selection criteria to assign budget items:

Budget Formula Field Names		
ACADEMIC_LOAD	CUR_PARTICIPANT_1	INSTITUTION
ACAD_CAREER	CUR_PARTICIPANT_2	INTERESTED_IN_SL
ACAD_GROUP_ADVIS	CUR_PARTICIPANT_3	MARITAL_STAT
ACAD_LEVEL_BOT	CUR_PARTICIPANT_4	NSLDS_LOAN_YEAR
ACAD_LEVEL_PROJ	DEPDNDCY_STAT	NUMBER_IN_FAMILY

Budget Formula Field Names		
ACAD_LOAD_APPR	EMPLID	POSTAL
ACAD_PLAN	END_DATE	PROCESSING_MODE
ACAD_PLAN_TYPE	ENROLL_CURNT_SUM	REFUND_CLASS
ACAD_PROG_PRIMARY	ENROLL_FALL	REFUND_PCT
ACAD_SUB_PLAN	ENROLL_NEXT_SUM	REFUND_SCHEME
ADMIT_TERM	ENROLL_SPRING	REFUND_SETID
ADVISOR_ID	ENROLL_WINTER	RESIDENCY
ADVISOR_ROLE	EXT_ORG_ID	SPORT1
AID_YEAR	FA_LOAD	SPORT2
APP_STATE_RESIDENCE	FA_LOAD_CURRENT	SPORT3
ATH_PARTIC_CD1	FA_NUMBER_OF_WEEKS	SPORT4
ATH_PARTIC_CD2	FA_UNIT_ANTIC	SRVC_IND_CD
ATH_PARTIC_CD3	FA_UNIT_COMPLETED	START_DATE
ATH_PARTIC_CD4	FA_UNIT_CURRENT	STATE_RESIDENCE
BUDGET_GROUP_CODE	FA_UNIT_IN_PROG	STDNT_GROUP
BUDGET_STATUS	FIN_AID_FED_EXCPT	STRM
CAMPUS	FIN_AID_FED_RES	STUDY_AGREEMENT
CAMPUS_FA	FIN_AID_ST_EXCPT	TERM_TYPE

Budget Formula Field Names		
COMMITTEE_ID	FIN_AID_ST_RES	UNT_TAKEN_FA
COUNTRY	FORM_OF_STUDY	UNT_TAKEN_FA_CL
COURSE_LD_PCT	HOUSING_TYPE	WEEKS_OF_INSTRUCT

Available Operations

This table describes the operations that are available to establish the relationship between the field name and its field value used to select students.

Operation	Description
<	Less than
<=	Less than or equal to
<>	Not equal to
=	Equal
>	Greater than
>=	Greater than or equal to
BLK	Is blank
LIK	Like

Defining Budget Formula Groups

Access the Budget Formula Groups page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Formulas, Budget Formula Groups).

Budget Formula		Budget Formula Groups	
Academic Institution:	PSUNV	PeopleSoft University	Aid Year: 2005
Category:	BOOK	Books and Supplies	
Find First 1 of 1 Last			
Effective Date:	11/13/2001	Status:	Active
Formula Detail Find View All First 1 of 4 Last			
Formula Number	1	Processing Order:	2
Budget Item Code:	BOOK01	Description:	Books for Undergrad Programs
Amount: 400.00 + -			
Student Groups Customize Find 1 of 1			
Field Name	Operation	Field Value	AND/OR
STDNT_GROUP	<input type="text"/>	<input type="text"/>	<input type="text"/>

Budget Formula Groups page

Use this page only if you indicate the field name STDNT_GROUP within the Formula Definition group box on the Budget Formula page.

- Operation** Enter the relationship between the student group and its value.
- Field Value** Enter the value for the student group.
- AND/OR** Select an AND/OR connector to include more than one student group in the criteria statement. For example, the student must be an athlete AND an honor student. Do not select an AND/OR connector in the last row of your formula.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Preparing to Track Student Data," Managing Student Groups

Defining Budget Assignment Trees

Access the Create Budget Trees page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Trees, Create Budget Trees).

Create Budget Trees

Academic Institution: PSUNV PeopleSoft University
 Aid Year: 2005

Category: TRNS Transportation

Find First 1 of 1 Last

*Effective Date: 01/01/1900
 *Status: Active

Find | View All First 1 of 3 Last

Formula Number 1
 *Processing Order: 1
 *Budget Item Code: TRANAZ
 Amount: 900.00

*Description: Transportation AZ Resident
 Short Description: Tran AZ

*Field Name: POSTAL
 *Operator: Within

Tree Information

Tree Name: FA_ZIPCODE_REGION
 Tree Node: REGION2

Create Budget Trees page

Financial Aid delivers a tree that contains all of the postal codes in the United States, which you can use to assign budget amounts based on geographic distance to your institution.

Important! The FA_ZIPCODE_REGION Budget Tree is delivered with the system. Changing the delivered tree or adding a budget tree requires code changes to accommodate a new tree name and ongoing system support. To create an institution-specific tree without making coding changes, use the same name as the delivered tree.

Budget Item Code	Select the budget item for which you are using a tree to determine the student's eligibility.
Field Name	Enter the field name against which to compare tree values. The default value is <i>Postal</i> , which indicates that postal codes in the tree should be compared against the student's postal code.
Operator	Select <i>Within</i> or <i>Not Within</i> to have the system look within or outside of the field name, in or out of the postal code in this example. For example, you assign 400.00 USD to students whose postal region is within Region 2. Then, you assign 600.00 USD to all students whose postal region is not within Region 2.
Tree Name and Tree Node	Displays the name and node of the tree being used to determine whether the student should be assigned this budget amount. The default tree is <i>FA_ZIPCODE_REGION</i> .

Creating Budget Groups

To set up budget groups, use the Budget Groups component (BUDGET_GROUP_TABLE). Use the BUDGET_GROUP_TABLE_CI component interface to load the data into the tables for these component interfaces.

Budget groups define a budget for groups of similar students, such as undergraduate freshmen, out-of-state residents, or married graduate students. You can use a budget group to assign a term budget online to a single student quickly. For example, you can create a budget group for undergraduate in-state residents for the 2005 spring term. Then you can create a term budget for spring 2005 using this budget group for a resident undergraduate student on the Student Budget Maintenance page.

This section discusses how to:

- Define detailed budget groups.
- Define generic budget groups.

Pages Used to Create Budget Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Budget Group	BUDGET_GROUP_TABLE	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Groups, Create Budget Group	Group budget items and associate the budget group with selected students within a specific aid year, career, and term.
Copy Budget Group Data	BDGT_GROUP_COPY	Click the Copy Setup Data button on the Create Budget Group page.	Copy setup data on the Create Budget Group page from one budget group code, academic institution, aid year, academic career, and term combination to another.

Defining Detailed Budget Groups

Access the Create Budget Group page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Groups, Create Budget Group).

Create Budget Group

Budget Group Code: PLBUD **Academic Institution:** PSUNV

Aid Year: 2005 Financial Aid Year 2004-2005
Career: UGRD Undergraduate
Term: 0542 2005 Spring Qtr
***Description:** Pell Less Than Half Time COA
Short Description: Pell LTHT

Cost of Attendance (Term)
Inst COA: 11,350.00
Fed COA: 11,350.00
Pell COA: 22,700.00
Pell LTHT: 8,300.00

Copy Setup Data

*Category	*Item Code		*Amount	Pell Amount	LHT Pell Amount	*Currency	Translate Long Name		
BOOK	BOOK01	Books	400.00	800.00	800.00	USD	Federal	+	-
FEES	FEES	FEES	350.00	700.00	700.00	USD	Federal	+	-
HSNG	HOU801	HOUSUCM	3,500.00	7,000.00	0.00	USD	Federal	+	-
MISC	MISC01	MISC01	300.00	600.00	0.00	USD	Federal	+	-
TRNS	TRANCA	Trans CA	800.00	1,600.00	800.00	USD	Federal	+	-
TUIT	TUITU1	Undergrad	6,000.00	12,000.00	6,000.00	USD	Federal	+	-

Create Budget Group page

Cost of Attendance (Term)

The values in this group box change when you add or subtract budget items or alter budget item amounts.

Inst COA (institutional cost of attendance) Displays the sum of all budget items assigned to this budget group that have an item class of *Federal* or *Institutional*. The Packaging routine uses this COA during awarding if you designate institutional methodology as the packaging methodology at the financial aid item type level.

Fed COA (federal cost of attendance) Displays the sum of all budget items assigned to this budget group that have an item class of *Federal*. The Packaging routine uses this COA during awarding if you designate federal methodology as the packaging methodology at the financial aid item type level.

Pell COA (Pell cost of attendance) Displays the sum of all Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants.

Pell LTHT (Pell less than half-time) Displays the sum of all Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants for students enrolled less than half-time.

Other Page Elements

Category and **Item Code** Select the budget category and item code to assign to this group.

Amount Displays the appropriate budget item amount. You can override this amount for this budget group only. This is a per term amount.

Pell Amount	Displays the appropriate budget item amount for the Pell budget. You can override this amount for this budget group only. This is an annual amount.
LHT Pell Amount (less than half-time Pell amount)	Displays the less than half-time Pell amount.
Currency	Displays the correct currency type for the Amount and Pell Amount fields. You can change the currency.
Item Class	Indicates whether the budget category contributes to the federal and institutional COA or contributes only to the institutional COA.
Copy Setup Data	Click to access the Copy Budget Group Data page, and copy the setup data on this page from one budget group code, academic institution, aid year, academic career, and term combination to another.

See Also

U.S. Department of Education Financial Aid Counselor's Handbook

Defining Generic Budget Groups

Access the Create Budget Group page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Groups, Create Budget Group).

If you plan to use background budget assignment, you can create a generic budget group code without specifying categories, item types, or amounts. This budget group code acts as a template during background budget assignment. Based on the budget formulas for which the student qualifies and the budget assignment table, the system automatically builds a budget for the student.

To create a generic budget group:

1. Add a new budget group code.
2. Enter a description and short description.

You do not have to populate the fields in the grid. You can leave them blank and save the record.

Preparing for Background Budget Assignment

After you establish your institution's budget categories, budget items, budget formulas and trees, and budget groups, you must complete three more steps before you can use online or batch background budget assignment. If you are not going to assign budgets in batch, you do not have to complete these three steps.

To set up background budget assignment, use the Budget Assignment (BUDGET_ASSIGNMENT) and Budget Assignment Run Control (BUDGET_ASGN_RUNCTL) components.

This section discusses how to:

1. Specify careers.

Specify the careers for which you want to assign budgets.

2. Assign automated budget categories.

List the budget categories that should be used to create a term budget for each term.

3. Create budget assignment run controls.

Specify the academic careers and terms to which you want to assign budgets during background budget assignment.

See Also

Chapter 20, "Working with Student Budgets," page 543

Pages Used to Prepare for Background Budget Assignment

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Career	BUDGET_CONTROL	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment, Assign Career	Specify a career for which you want to assign budgets during background budget assignment by establishing an effective-dated row for the career. You must add additional careers from the search page.
Assign Budget Category	BUDGET_ASSIGN_CATG	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment, Assign Budget Category	Assign budget categories to each term that is valid for the combination of career, aid year, and academic institution.
Create Budget Run Controls	BUDGET_ASGN_RUNCTL	Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment Run Control, Create Budget Run Controls	Select which careers and terms to use when running background budget assignment.

Specifying Careers

Access the Assign Career page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment, Assign Career).

Assign Career

Assign Budget Category

Academic Institution:

PSUNV

PeopleSoft University

Aid Year:

2005

Academic Career:

UGRD

Undergraduate

Find | View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Undergraduate System Assigned

Comments:

Assign Career page

Establish an effective-dated row for each combination of career, aid year, and academic institution to which you want to assign budgets using the Student Budget Assign process (FAPBDGTS).

Assigning Automated Budget Categories

Access the Assign Budget Category page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment, Assign Budget Category).

Assign Career		Assign Budget Category	
Academic Institution:	PSUNV	PeopleSoft University	Aid Year: 2005
Academic Career:	UGRD	Undergraduate	
<div>Find First 1 of 1 Last</div>			
Effective Date:	01/01/1900		
<div>Find First 1 of 8 Last</div>			
*Term:	0545	2005 Summer	*Bdgt Group: USYSTEM Undergraduate System Assigned
<div>Find 1-2 of 2</div>			
*Category:	BOOK	Books	*Error Type: Warning
*Processing Rule:	Formula		
*Description:	Books and Supplies		
Comments:	Books and Supplies		
<div>Find 1-2 of 2</div>			
*Category:	TUIT	Tuition	*Error Type: Warning
*Processing Rule:	Formula		
*Description:	Tuition and Fees		
Comments:	Tuition and Fees		

Assign Budget Category page

If you have not set up generic budget groups to use with background processing, you must list each budget category individually. During background budget assignment, the system assigns the appropriate budget item and amount to each student using the budget formulas or trees that you set up for each budget item.

Bdgt Group (budget group)

If you have established generic budget groups for batch budget processing, enter the budget group code. The page automatically displays the budget categories that you assigned to this budget group.

Category

Enter the budget category to assign to the selected term's budget. Make sure that the category is valid for the selected term. For example, a summer term might not include housing costs, while a fall term includes housing costs.

Error Type

Select the action to take when the system encounters an error in assigning a value to a student for this budget category. Values are:

None: The system does not take any action when it encounters an error.

Skip: The system skips the record for which it encountered the error and does not assign a value to that record.

Stop: The system stops all processing when it encounters an error.

Warning: The system warns you of the error but continues processing. No budget item is assigned to the student for the budget category for which the system encountered the error. The student receives a zero dollar amount for that budget category and a warning that the student failed the budget assignment criteria for that budget category.

For example, you might assign the child care budget category a skip error type because not all students are parents and, therefore, would not be eligible for a dependent child care allowance. You might assign the fees budget category a stop type because all students need to have a particular fee amount in their budgets. You might assign a warning for the books budget category based on the student's career. If the career does not match the book criteria defined in the budget assignment setup, the system does not assign a book budget item and displays a warning. You can then reevaluate the assignment criteria to ensure correct definition.

Processing Rule

Select whether a formula, tree, or other assigned possibilities—such as tuition calculations—determine the amount assigned to the student for this budget category. Values are:

Formula: The system uses a budget formula to determine the budget item amount assigned to the student.

Tree: The system uses a budget tree to determine the budget item amount assigned to the student. When you select this option, a Name field appears and displays the name of the tree used to define the budget category.

Tuition: The system calculates the student's tuition budget item amount by running the Tuition Calculation routine. The Tuition Calculation routine can be run either by Student Financials or Financial Aid; the Use Actual/Projected Tuition check box on the Create Budget Run Controls page specifies which Tuition Calculation routine to use.

Name

Displays the name of the tree used to determine which budget item is assigned to a student. This field appears only when you select *Tree* as the processing rule.

Description

You can edit the default description to specify how the rule is used. This can be different from the description on the Create Budget Categories page. For example, the book budget category might have a description of Books on the Create Budget Categories page, but be listed as *Book Allowance Fall 2002* on this page.

Comments

The default value is the budget category description, but you can edit the description to provide more information about the processing of this budget category.

Use the top set of scroll arrows to view rows with different effective dates. Use the middle set of scroll arrows to view different terms. Use the bottom set of scroll arrows to view additional budget categories for a specific term and budget group combination.

Creating Budget Assignment Run Controls

Access the Create Budget Run Controls page (Set Up SACR, Product Related, Financial Aid, Budgets, Budget Assignment Run Control, Create Budget Run Controls).

Create Budget Run Controls

Institution:

PSUNV

PeopleSoft University

Aid Year:

2005

Financial Aid Year 2004-2005

Find

First

1 of 1

Last

*Eff Date:

01/01/1900

Status:

Active

Descr:

UGRD_GRAD

Short Desc:

UGRD_GRAD

Find

View All

First

1 of 12

Last

*Career:

GRAD

Graduate

*Term:

0530

2004 Fall

☐

Use Actual/Projected Tuition

Table Maintenance Options

☒

Delete?

Status:

A

Delete All

☒

Reset?

Status:

A

Reset All

Value:

N

No Asgn

Create Budget Run Controls page

Define each combination of career and term in its own row.

- Career

Select the career of the students for which the system assigns budgets when you run the Student Budget Assign process (FAPBDGTS). To include another career, insert another row.
- Term

Select the term for which the system assigns budgets when you run the Student Budget Assign (FAPBDGTS) process. To run the process for multiple terms for a career, insert another row.
- Use Actual/Projected Tuition

Select to use the tuition value that the tuition calculation in Student Financials generates based on tuition group rules that incorporate Student Records data. If Student Financials has not yet calculated tuition for this term and this check box is selected, the tuition returned is 0.00 USD.

If the check box is cleared, then Financial Aid calculates the student's tuition based on rules established in Student Financials for financial aid tuition groups. The tuition amount calculated by Financial Aid is only an estimated tuition amount.

Delete and Status

Select to have the system delete records in the work table according to the status that you select. The Status field appears when you select this check box. Values for the Status field are:

A—Delete All: The system deletes all records in the work table.

E—Those with Errors: The system deletes only the records in the work table that have errors.

I—Those in Progress: The system deletes the records in the work table that are still in progress. These are records that the system has not moved to the student's budget tables and is still processing.

Reset and Status

Select to have the system reset the Budget Required field on the Financial Aid Info page. The Status and Value fields appear when you select this check box. Values for the Status field are:

A—Reset All: The system resets the Budget Required field for all records in the work table.

E—Those with Errors: The system resets the Budget Required field only for the records in the work table that have errors.

I—Those in Progress: The system resets the Budget Required field on FA Term for the records in the work table that are still in progress. These are records that the system has not moved to the student's budget tables and is still processing.

Value

Appears when you select the Reset check box. Specify the value to set the Budget Required field to on the student's Financial Aid Term record for each processed term. Values include:

E—Error During Budget Assignment: An error occurred during the Budget Assignment process.

I—In Progress: Budget assignment is currently in progress for this student for the given terms.

N—No Budget Assignment: The system sets the student's Financial Aid Term Budget Required field to this value, and selects the student the next time that you generate batch budgets.

Y—Yes Assign Budget: The system sets the student's Financial Aid Term Budget Required field to this value, and selects the student the next time that you generate batch budgets.

Note. The Stdnt Bdgt Assign - Delete (student budget assignment - delete) process (FAPBDGTD) uses the options that you define in the Table Maintenance Options group box.

See Also

Chapter 19, "Managing Financial Aid Terms," page 505

Chapter 5

Setting Up Packaging Basics

This chapter provides an overview of packaging basics and discusses how to:

- Define packaging variables.
- Define disbursement plans and split codes.
- Set up aggregate aid.
- Set up award messages.
- Set up loan fees.
- Define financial aid item types.
- Budget fiscal limits.
- Prepare for early financial aid offers.
- Set up restricted aid.
- Set up award adjustment reasons.

See Also

Chapter 6, "Setting Up ACG and SMART Grants," page 147

Understanding Packaging Basics

The items covered in this chapter are the basic items required for all three modes of packaging (manual, auto, and mass). If your institution is only going to use manual awarding, you only need to perform setup tasks in this chapter. If you are going to use Auto Packaging or Mass Packaging, you must perform the setup tasks outlined in the "Setting Up Auto Packaging and Mass Packaging" chapter.

This section lists prerequisites and common elements and discusses:

- Award adjustment reasons.
- Early financial aid offers.
- Awarding versus packaging.
- Financial aid item types.

See Also

Chapter 8, "Setting Up Auto Packaging and Mass Packaging," page 223

Prerequisites

Before you begin to set up your institution's financial aid item types and your awarding and packaging rules, you must:

- Set up your institution's installation defaults and other basic elements of the financial aid application processing cycle (such as aid year and valid careers for aid year).
- Set up your item types for financial aid in PeopleSoft Enterprise Student Financials—you cannot set up your financial aid item types until you have set up item types.
- Establish your financial aid terms.
- Review the concepts of tablesets and setIDs.

If you plan to use admissions rating components as criteria for awarding certain awards, you must:

- Have a list of the rating components used by the admissions office at your institution.
- Know what the various rating components are used for and what names have been used for them in PeopleSoft Enterprise Recruiting and Admissions.

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*, "Setting Up for Evaluating Applicants."

Before using the Equation Processor you should know what fields are valid for use in equations and what their names are. A list of valid fields can be found in the "Using the Equation Processor" section. Packaging equations are used for queries and selections from the database and to calculate values.

See Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Viewing and Editing Equations, page 229.

Common Element Used in This Chapter**Copy**

Used to access a page where you can copy data you have already entered into something new you are creating. For example, you can copy information from one financial aid year to another aid year or from one career to another career within the same aid year.

Award Adjustment Reasons

Financial aid counselors use award adjustment reasons to document why they made a change to the student's award. Award adjustment reasons are available for you to edit, add to, or delete. Award adjustment reasons are required by the Professional Judgement page, and they can also enhance your ability to track patterns in awarding.

Early Financial Aid Offers

If you plan to offer early financial aid awards, and you want to use broad categories of aid instead of specific awards, you must set up these broad categories from which a student could be awarded early financial aid. For instance, you can create categories for scholarships, loans, grants, and work-study. When you actually create an early financial aid offer, you use these categories instead of financial aid item types.

Awarding versus Packaging

A note about terminology: Awarding and packaging are terms that are often used interchangeably. In this book, awarding is used to mean the activity of choosing one financial aid award at a time for a student. Packaging is used to refer to a process in which many awards are given to a student at one time to make a financial aid award package.

Financial Aid Item Types

Financial aid item types are selected item types that your institution has assigned to the funds awarded as financial aid. The item type is used to map the financial aid award transaction to the appropriate general ledger account during the general ledger process. The way item types are classified governs whether they are considered as financial aid item types.

Setting up your item types for financial aid requires several major steps:

1. Add keywords on the Keywords page to simplify the search for a financial aid item type in a search dialog box.

Keywords that you might use for your item types include grants, loans, work (for work-study), scholarship, and merit.

Note. Financial aid and bursar offices should work together to set up your keywords so that a keyword standard can be defined for your institution.

2. Set up the item types used by financial aid in the Item Types component.
3. Set up financial aid item types.
4. Set up fiscal item types to define the amount of spending money for a particular fund.

Note. Use the same setID for all of your financial aid item types.

See Also

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup"

Defining Packaging Variables

To set up packaging variables, use the Package Rating Components component (PKG_RTNGCMP_GROUP).

This section provides an overview of packaging variables and discusses how to:

- Define package rating components.
- Enter institution-specific variables.
- Populate rating components in batch.
- Populate rating components manually.

Understanding Packaging Variables

Many fields are already available in Financial Aid, but the Packaging Variables component enables you to create additional institutionally defined variable fields for use in the Packaging process. You can define character variables, numeric variables, and yes or no flags. Package rating components are also included as packaging variables.

Use the package rating components that you define here to define specific student populations for packaging. For example, you may want to select all students with total SAT I scores over 1000 for a particular award. This could be done by assigning the SAT I criteria used by Recruiting and Admissions to one of the package rating components. Then, when defining your population of students for packaging, you would include the package rating component that referred to SAT I score in your selection formula. Package rating components are defined for each career. You must have a different group of package rating components for each career that utilizes package rating components in packaging plans. Enter the admissions rating components and GPA types in any order, but keep track of which items you enter for each package rating component for future reference.

The Rating Component 1 and 2 pages in the Packaging Variables component enable you to enter or to view package rating component information. Package rating components correspond to admissions rating components. You can enter package rating component information manually or using a background process.

To enter package rating component information manually:

1. Select the admissions rating components to use as package rating components in the Package Rating Components component.
2. Enter the student's values on the Rating Components 1 page or Rating Components 2 page.

To enter package rating component information in batch:

1. Select the admissions rating components to use as package rating components in the Package Rating Components component.
2. Run the Assign Packaging Rtng Component (assign packaging rating component) process (FAPKGCMP) on the Assign Packaging Rating Components page.
3. Review values returned by the process on the Rating Components 1 page or Rating Components 2 page.

You can change the field names on these pages by using the Application Designer. For example, if you use a character variable to represent a student's county of residence, you can change Var Char 1 to County. If you do not change the field names, make a note of what each variable value represents for future reference.

Pages Used to Define Packaging Variables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Package Rating Components 1 and Package Rating Components 2	PKG_RTNGCMP_TABLE1 PKG_RTNGCMP_TABLE2	Set Up SACR, Product Related, Financial Aid, Awards, Package Rating Components, Package Rating Components 1 and Packaging Rating Components 2	Define package rating components. Select the admissions rating components and the GPA types that you want to be available for packaging equations as package rating components.
User Variables	STDNT_VAR_CHAR	Financial Aid, Awards, Award Processing, Assign Packaging Variables, User Variables	Enter institution-specific variable values for a student.
Assign Packaging Rating Components	RUNCTL_FA_PKG_RC	Financial Aid, Awards, Award Processing, Assign Packaging Ratings, Assign Packaging Rating Components	Populate rating components in batch. Move selected admissions rating components and GPA types and their associated values to the Package Rating Components 1 and 2 pages.
Rating Component 1 and Rating Component 2	STDNT_VAR_CMP1_7 STDNT_VAR_CMP8_14	Financial Aid, Awards, Award Processing, Assign Packaging Variables, Rating Component 1 and Rating Component 2	Populate rating components manually. View or manually enter the student's particular value associated with each package rating component.

Defining Package Rating Components

Access the Package Rating Components 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Package Rating Components, Package Rating Components 1).

Package Rating Components 1		Package Rating Components 2	
Academic Institution:	PSUNV PeopleSoft University	Aid Year:	2008 2007-2008
Academic Career:	UGRD Undergraduate		
<div>Find View All First 1 of 1 Last</div>			
*Effective Date:	10/14/2008	*Status:	Active
Component #1:	SATI <input type="checkbox"/> SR	Component #6:	<input type="checkbox"/> SR
Component #2:	ACTV <input type="checkbox"/> SR	Component #7:	<input type="checkbox"/> SR
Component #3:	RECOM <input type="checkbox"/> SR	Component #8:	<input type="checkbox"/> SR
Component #4:	<input type="checkbox"/> SR	Component #9:	<input type="checkbox"/> SR
Component #5:	<input type="checkbox"/> SR	Component #10:	<input type="checkbox"/> SR
SR = Records Rating Component			

Package Rating Components 1 page

Component #1-20

Enter the admissions rating component or GPA type that you want to use as a package rating component. You can enter values in any fields in any order.

Note. To select a GPA type, you must first select the SR check box next to that field.

SR (student records)

Determines what values you can select in the Component field. Select to have only GPA types available for selection.

Entering Institution-Specific Variables

Access the User Variables page (Financial Aid, Awards, Award Processing, Assign Packaging Variables, User Variables).

User Variables		Rating Component 1	Rating Component 2
Bell, Karleen		ID: FA0608	Aid Year: 2008
Institution: PSUNV		Career: UGRD Undergraduate	
Var Char1:	SIERRA COUNTY	Var Num1:	1200.000
Var Char2:	EARLY ADMIT	Var Num2:	0.000
Var Char3:	PSYCHOLOGY	Var Num3:	5,353.000
Var Char4:		Var Num4:	0.000
Var Char5:		Var Num5:	0.000
Var Char6:		Var Num6:	0.000
Var Char7:		Var Num7:	0.000
Var Char8:		Var Num8:	0.000
Var Char9:		Var Num9:	0.000
Var Char10:		Var Num10:	0.000
			<input type="checkbox"/> User Variable Y/N Flag #1
			<input type="checkbox"/> User Variable Y/N Flag #2
			<input type="checkbox"/> User Variable Y/N Flag #3
			<input type="checkbox"/> User Variable Y/N Flag #4
			<input type="checkbox"/> User Variable Y/N Flag #5
			<input type="checkbox"/> User Variable Y/N Flag #6
			<input type="checkbox"/> User Variable Y/N Flag #7
			<input type="checkbox"/> User Variable Y/N Flag #8
			<input type="checkbox"/> User Variable Y/N Flag #9
			<input type="checkbox"/> User Variable Y/N Flag #10

User Variables page

Var Char 1-10 (character variable) Enter any alphabetic characters such as words, phrases, or symbols.

For example, you can use a character variable to define a particular student interest, such as an interest in psychology, that helps determine eligibility for a scholarship, such as a psychology merit scholarship.

Var Num 1-10 (numeric variable) Enter numeric variables to define anything that has a numeric value such as percentages, integers, or dollar amounts. You can use numeric variables to define formulated numeric values such as test scores plus GPA or a raw index of a student's financial need. If you do not enter a value in numeric variable field, the zeros remain in the field. The format for this field is numeric.

User Variable Y/N Flag #1-10 Yes/No Flags can be defined for any variable field with a Y or N value. An example of when you might use a Yes/No Flag is the Ability To Benefit test. Select the check box to indicate yes. Clear the check box to indicate no. The value that you enter should be true for the student whose name appears in the top portion of the page.

Populating Rating Components in Batch

Access the Assign Packaging Rating Components page (Financial Aid, Awards, Award Processing, Assign Packaging Ratings, Assign Packaging Rating Components).

Assign Packaging Rating Components

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Find First 1 of 1 Last

*Institution: PSUNV PSU *Aid Year: 2008 *Career:

Process Components From

☐ Admissions Rating Components ☐ Stdnt Records Special GPA ☒ Both ☒ Overwrite

Admissions Criteria Find | View All First 1 of 1 Last

Admit Term: Stdnt Lvl: Evaluation Status: Evaluation Code:

Records Criteria Find | View All First 1 of 1 Last

Term - Student FA Term: Term - Student Spcl GPA:

Match Level

☐ Academic Career ☐ Academic Program ☐ Academic Plan ☐ Academic Sub-Plan

Assign Packaging Rating Components page

Process Components From

Select the criteria that you want the system to use when selecting students for processing.

Admissions Rating Components

Select this option to use admissions criteria for selecting students. Use this option if you want the process to select data from the admissions evaluation area. If you select this option, you cannot enter any criteria in the Records Criteria group box.

Stdnt Records Special GPA (student records special grade point average)

Select this option to enter Student Records criteria for selecting students. Use this option if you want the process to select data from the Student Special GPA page in Student Records. If you select this option, you cannot enter any criteria in the Admissions Criteria group box.

Both

Select this option to enter both admissions and student records criteria for selecting students. Use this option to have process select data from both admissions and special GPA data.

Other Page Elements**Overwrite**

Select to overwrite the previous values entered in the Packaging Variables Rating Components page for the students included in this batch.

Admissions Criteria

Enter the Recruiting and Admissions criteria that the system should use to select students for processing.

Admit Term	Students who were admitted during the selected term are included in the process.
Stdnt Lvl (student level)	Students whose student level is equal to or higher than the selected value are included in the process. The student level corresponds to where the student is in the admissions process or indicates that they are an accepted or continuing student.
Evaluation Status	Students whose evaluation status matches the selected value are included in the process. The student's evaluation status is related to where a student is in the admissions process. You can select: <i>CM</i> (committee evaluation in progress), <i>FN</i> (final), <i>HD</i> (on hold), or <i>IP</i> (in progress).
Evaluation Code	Students whose evaluation code matches the selected value are included in the process.

Records Criteria

Enter the Student Records criteria that the system should use to select students for processing.

Term - Student FA Term	Select the financial aid term that should be used to select the student's career, academic program, and academic plan for comparison against the match criteria.
Term - Student Spcl GPA (term - student special GPA)	Select the term from which the process should select the GPA types and the corresponding GPA value.
Match Level	Select Academic Career, Academic Program, Academic Plan or Academic Sub-Plan as the matching criteria.
Run	Run the Assign Packaging Rtnng Component (assign packaging rating component) process (FAPKGCMP) when you are ready to process students. Run this process periodically so that when rating components are used, the values are current.

See Also

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook, "Setting Up for Evaluating Applicants"

Populating Rating Components Manually

Access the Rating Component 1 page (Financial Aid, Awards, Award Processing, Assign Packaging Variables, Rating Component).

User Variables	Rating Component 1	Rating Component 2
Bell,Karleen	ID: FA0608	Aid Year: 2008
Institution: PSUNV	Career: UGRD Undergraduate	
Component #1:	<input type="text" value="ESSAY"/> Essay(s)	Value #1: <input type="text" value="28.0000"/>
Component #2:	<input type="text" value="EXTRA"/> Extracurricular Activities	Value #2: <input type="text" value="46.0000"/>
Component #3:	<input type="text" value="ACT"/> Highest ACT	Value #3: <input type="text" value="27.0000"/>
Component #4:	<input type="text"/>	Value #4: <input type="text"/>
Component #5:	<input type="text"/>	Value #5: <input type="text"/>
Component #6:	<input type="text"/>	Value #6: <input type="text"/>
Component #7:	<input type="text"/>	Value #7: <input type="text"/>
Component #8:	<input type="text"/>	Value #8: <input type="text"/>
Component #9:	<input type="text"/>	Value #9: <input type="text"/>
Component #10:	<input type="text"/>	Value #10: <input type="text"/>

Rating Component 1 page

The package rating components are broken up into two groups with ten components per page. Package rating components are mapped to Recruiting and Admissions or Student Records criteria on the Package Rating Components page. If you are populating the package rating components in batch, run the Assign Packaging Rtnng Component (assign packaging rating component) process (FAPKGCMP) periodically, so that when you use the package rating components the values are current.

Component #
(component number)

If you have run the Assign Packaging Rating Component (FAPKGCMP) process, the package rating components set up on the Package Rating Components 1 and 2 pages are populated in this field and the student's value for that component is displayed in the corresponding Value field. Whether or not you have run the above process, you can select an admissions rating component and enter the corresponding value manually.

Value # (value number)

A numeric field that represents the student's value for the corresponding package rating component. If you have run the Assign Packaging Rtnng Component (FAPKGCMP) process, this field is automatically populated but you can change the value. If you are entering package rating components manually, enter the correct value.

Defining Disbursement Plans and Split Codes

To set up disbursement plans and split codes, use the Disbursement Plan Table component (DISBURSE_PLAN_TBL), the Disbursement ID Table component (DISBURSE_ID_TBL), the Disbursement Split Code component (DISB_SPLIT_CD), and the Disbursement Split Cd Formula component (DISB_ID_SPLIT).

This section provides an overview of disbursement plans and split codes and discusses how to:

- Create disbursement plans.
- Set up disbursement IDs.
- Set up disbursement split codes.
- Define split code formulas.

Understanding Disbursement Plans and Split Codes

Financial aid funds are awarded to students based on an annual or aid year amount, but you would rarely deliver these funds to students in one lump sum, unless the student is in attendance for only one term. Disbursement plans specify when and how much of a particular award to disburse, by term, to the student's account in Student Financials. For example, if your institution has two terms, you may disburse awards once per term or you may disburse multiple times within a term. Disbursement plans are defined by career, so if you have a law school on semesters and your undergraduates are on quarters, you can define different disbursement plans for each career.

Before you begin, you must gather all the possible target disbursement dates for the different student populations that your institution supports. For example, students enrolled in the law school begin classes 10 days prior to all other academic programs. You must also have a good understanding of any special disbursement patterns a fund may have. For example, you may have an institutional fund that is disbursed in one lump sum for the year or perhaps disbursed on a monthly basis.

Pages Used to Define Disbursement Plans and Split Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disbursement Plan	DISBURSE_PLAN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Plan Table, Disbursement Plan	Create disbursement plans, by aid year, that you offer for each career at your institution. Disbursement plans are high level structural schemes possible within an academic career.

Page Name	Definition Name	Navigation	Usage
Copy Disbursement Plan Data	DISB_PLAN_COPY	Click the Copy button on the Disbursement Plan page.	Copy the information on the Disbursement Plan page from one combination of aid year, career, and academic institution to another.
Disbursement ID	DISBURSE_ID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement ID Table, Disbursement ID	Set up disbursement IDs and terms for each disbursement that should be associated with the disbursement plan. Disbursement IDs identify all the possible target disbursement dates within a specific period.
Copy Disbursement ID Data	DISB_ID_COPY	Click the Copy button on the Disbursement ID page.	Copy the information on the Disbursement ID page from one combination of academic institution, aid year, academic career, and disbursement plan to another.
Disbursement Split Code	DISB_SPLIT_CD	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Codes, Disbursement Split Code	Set up disbursement split codes, or various disbursement patterns for this disbursement plan. Disbursement split codes are created to provide a label to the various patterns of disbursement IDs. For example, equal disbursement across terms, or fall only disbursement.
Copy Split Code Data	SPLIT_CODE_COPY	Click the Copy button on the Disbursement Split Code page.	Copy the information on the Disbursement Split Code page from one combination of academic institution, aid year, and academic career to another.
Disbursement Split Formula	DISB_ID_SPLIT	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula	Define split code formulas, or disbursement percentages for the split codes you created based on the disbursement split code descriptions—this setup provides the specific percentage distribution to each disbursement ID created within a disbursement plan.

Page Name	Definition Name	Navigation	Usage
Copy Split Code Formulas	ID_SPLIT_COPY	Click the Copy button on the Disbursement Split Formula page.	Copy information on the Disbursement Split Formula page from one combination of academic institution, aid year, and academic career to another.

Creating Disbursement Plans

Access the Disbursement Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Plan Table, Disbursement Plan).

Disbursement Plan

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate
Aid Year: 2008 2007-2008

Copy

Customize Find View All First 1-10 of 73 Last					
*Plan	*Description	Short Description	30 Day Delay Loan Plan		
01	Two Semesters	Two Semst	<input type="checkbox"/>	+	-
02	Three Semesters	Three Sem	<input type="checkbox"/>	+	-
03	Monthly - Semester	Monthly	<input type="checkbox"/>	+	-
04	Quarters	Quarters	<input type="checkbox"/>	+	-
05	Fall Qtr	Fall Qtr	<input type="checkbox"/>	+	-
06	Wtr. Qtr	Wtr. Qtr	<input type="checkbox"/>	+	-
07	Spr. Qtr	Spr. Qtr	<input type="checkbox"/>	+	-
08	Fall Sem	Fall Sem	<input type="checkbox"/>	+	-
09	SPRING SEM	SPRING SEM	<input type="checkbox"/>	+	-
10	Wtr/Spr Qtr	Wtr/Spr Qt	<input type="checkbox"/>	+	-

Disbursement Plan page

Disbursement plans must account for all possible patterns that you use to disburse money to a student. For example, if your institution supports quarter-based terms, you might have a plan for all three quarters, fall and spring quarter, fall and winter quarter, winter and spring quarter, and then a plan for each quarter alone. That way, no matter what the student's attendance pattern is, you have a disbursement plan defined to match that pattern. Define at least one disbursement plan for each career. For clarity, you may want to make your disbursement plan code or value consistent across careers. Your disbursement plan defines the pattern for disbursement of financial aid funds. For example, at a semester-based institution, disbursements can occur in the fall semester only, the spring semester only, or both semesters. Each of these patterns would be defined as a separate disbursement plan.

Note. For all non-Direct Lending programs, you must provide disbursement plan and split code schemes that do not include any zero percentages in a disbursement ID. When a loan is originated, the scheduled disbursement amounts and associated disbursement ID are carried forward to the PeopleSoft Financial Aid Loan Origination process. All non-DL loans with a zero amount associated with a disbursement ID are rejected during the initial origination process. For example, a disbursement plan of three quarters (fall, winter, and spring) cannot be used to award a winter and spring Federal Family Education Loan Program (FFELP) subsidized Stafford loan.

Plan Enter a two-character code (alphanumeric) for the disbursement plan. You should use sequential numeric codes (such as 01, 02, 03) rather than skipping numbers (02, 01, 03).

Description Enter descriptions that easily distinguish one plan from another for easy identification.

30 Day Delay Loan Plan Select to indicate that the associated disbursement plan has a 30-day delay for the first loan disbursement. A first-time freshman receiving a loan cannot receive the first disbursement for the loan until 30 days into the term. You need to establish a separate disbursement plan for this instance. Review the setup for the 30-day rule for your institution on the Financial Aid Defaults page.

See Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," [Defining Installation Level Defaults](#), page 15.

Setting Up Disbursement IDs

Access the Disbursement ID page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement ID Table, Disbursement ID).

Disbursement ID

Institution:	PSUNV	PeopleSoft University	Aid Year:	2008	2007-2008	Copy
Career:	UGRD	Undergraduate	Disbursement Plan:	01	Two Semesters	

[Find](#) | [View All](#)
First 1 of 2 Last

*Disbursement ID:	01	(Aid Year Sequence)	+	-
*Description:	Fall			
Short Description:	Fall			
*Term:	0590	2007 Fall	Award Period:	Academic
*Disbursement Date:	08/20/2007	31		
Loan Request Dt:	08/16/2007	31		

Disbursement ID page

Disbursement IDs provide all the possible target disbursement dates with a specific disbursement plan. Disbursement split codes and formulas create the disbursement patterns and distribution percentages to each applicable disbursement ID. When you run the disbursement and authorization processes to disburse aid to a student's account, the system reviews a comprehensive set of rules to ensure the eligibility of aid to a student's account. For example, a federal SEOG award may be targeted to disburse on the first day of the term; however, aid is not disbursed until a student completes the verification process.

Disbursement ID

Enter a two-digit number for each term's disbursement that occurs in the disbursement plan identified at the top of the page. The number indicates the aid year sequence for the disbursements for this plan. For example, you may assign your fall term an *01* disbursement ID, winter term an *02*, and spring term an *03*. The aid year sequence for this disbursement plan would be 01, then 02, and then 03. Disbursements process in sequential order within a disbursement plan.

Ensure that if the term includes a nonstandard term, such as a summer term, the nonstandard term is placed in the correct sequence. For example, if the disbursement plan includes a disbursement during the summer term and your institution has a leading summer term, the disbursement IDs for the summer term must come before those for terms in the academic award period.

If your disbursement plan has the 30-Day Delay check box selected, define a disbursement ID to accommodate this condition with the appropriate disbursement date.

Term

Select the academic term to which this disbursement ID applies. The system populates the Award Period, Disbursement Date, and Loan Request Dt (loan request date) fields based on the selected term when you move out of this field. Verify that the term is associated with an award period compatible with the award periods spanned by the disbursement plan.

Award Period

Displays the award period associated with the selected term. Verify that the term corresponds to the correct award period. To correct the award period, use the Valid Terms for Career page to change the term's award period.

Disbursement Date

This is the date on which financial aid should be applied to the student's account. After the term value is entered, the system defaults a disbursement date of 10 days prior to the term begin date, which is defined in Student Records on the Term/Session Table component. You can override this date. If you plan to disburse more than once a term, the disbursement date for each disbursement ID needs to correspond to when you want the disbursements to initially occur. For example, for a monthly disbursement during the fall term, the first disbursement ID could use the defaulted date, for example August 15. The next disbursement ID would have a disbursement date of September 15, the third disbursement ID would have a disbursement date of October 15, and so on.

Note. Current federal guidelines state that federal financial aid cannot be disbursed to a student more than 10 days prior to the first day of the term, and that federal financial aid should be disbursed separately for each term.

Loan Request Dt (loan request date)

Enter the date you are requesting loan funds to be sent from the lender to your institution. The default loan request date is 13 days prior to the term start date, which is the current federally defined legal maximum.

Note. The loan request date is carried forward to the Loan Origination pages where the date can be modified. Care should be taken to ensure that loan request dates remain in sync.

Setting Up Disbursement Split Codes

Access the Disbursement Split Code page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Codes, Disbursement Split Code).

Disbursement Split Code				
Institution:	PSUNV	PeopleSoft University	Aid Year:	2008 2007-2008
Career:	UGRD	Undergraduate	Disbursement Plan:	01 Two Semesters
Copy				
*Split Code	*Description	Short Description		
01	Equal across terms	Equal acro	+	-
02	Fall Semester	Fall Semes	+	-
03	Spring Semester	Spring Sem	+	-

Disbursement Split Code page

Disbursement split codes put a label to various disbursement schemes that instruct the system how to divide an award disbursement amount among terms. For example, if your institution has three terms, you would want one split code to split disbursements equally among the three terms. You usually have more than one split code per disbursement plan depending on the business practices of your institution and the needs of your financial aid office. You define the distribution percentages to these split codes further in the Disbursement Split Code Formula setup. You can configure all disbursements on a individual award basis; however, it is better to for you to define most of the schemes in advance.

Split Code

Enter a two-character code for the split code you are defining for this disbursement plan. You can define the split code with numbers or characters.

Description

Enter a description that distinguishes one plan from another for easy identification. For example, a split code of Two Semesters could indicate disbursements should be split in two—one for fall term and one for spring term.

Defining Split Code Formulas

Access the Disbursement Split Formula page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula).

Disbursement Split Formula

Copy

Institution:

PSUNV

PeopleSoft University

Aid Year:

2008

Financial Aid Year 2007 - 2008

Disbursement Plan:

01

Two Semesters

Career:

UGRD

Undergraduate

Split Code:

01

Equal across terms

Even Split Option:

Even among first disb for Term

Total Disbursement:

100.00

Disbursement Split Percentages

Disbursement ID	Description	Term	Disbursement Date	Percentage
01	Fall	0590	08/20/2007	0.00
02	Spring	0600	01/14/2008	0.00

Disbursement Split Formula page

Split code formulas define what percentage of the award should be disbursed for each disbursement ID for each disbursement plan and split code combination. Define the split code formula for each split code that you have defined for your institution.

Even Split Option

Select a value in this field to split the award amount equally among all terms or equally among all disbursements in a term, instead of manually splitting the award using percentages. This field affects how disbursement-protected awards are distributed when they are modified.

See [Chapter 33, "Managing Special Cases in Packaging," Protecting Disbursements During Awarding, page 1178.](#)

In the following discussion, *term target amount* refers to the total disbursement amount within the term.

- *(none)*: Indicates that you do not want to use an even split option. You must enter the percentage of the total award each disbursement ID should receive in the Percentage field. The total of all percentages entered must equal 100.00. If you select an even split option, you cannot enter any values in the percentage fields.
- *Invalid value*: Do not use.
- *Even across disbs by Term* (even across disbursements by term): The Packaging process adheres to equal term target amounts and spreads that term's disbursements evenly among all disbursement IDs in the term. For example, the student's award is 3,000.00 USD for three terms and there are two disbursement IDs per term. The term target amount is 1,000.00 USD for each term and 500.00 USD for each disbursement ID in the term.

Note. This option can be used when you want to spread Pell Grant across multiple disbursement IDs per term.

- *Even among first disb by Term* (even among first disbursement by term): The award amount is distributed evenly among the terms within the disbursement plan. Regardless of the number of disbursements in the term, the amount is distributed in the first disbursement of each term. For example, the student's award is 3,000.00 USD for three terms and there are two disbursement IDs per term. The term target amount is 1,000.00 USD for each term and the first disbursement ID of that term only.
- *Even across disbs for One Term* (even across disbursements for one term): Use to define the new split code for a single term loan.

Note. To facilitate increases and change processing for Stafford one term direct loan MPN item types, you should set up and define at least four disbursement IDs. You can define up to a maximum of 20 disbursements for a single term.

Total Disbursement

The sum of the percentages that you have entered. Your percentages must add up to 100 percent for the entire year.

Percentage

This field is not available if you select an even split option. Select the percentage of the total award you want to disburse for the given disbursement ID. Your percentages should match the description of your split codes. For example, for a two-semester disbursement plan, if your split code is set up for a 40/60 split between terms, the percentages for each semester would be 40 percent for the fall disbursement ID and 60 percent for the spring disbursement ID.

Midpoint Select to identify the midpoint date.

Comparison of Valid Even Split Option Values

Here's a comparison of the two valid field values using a 3,000.00 USD award amount (all values in USD):

<i>Even Split Option</i>	<i>Fall</i>		<i>Winter</i>		<i>Spring</i>	
	1,000.00		1,000.00		1,000.00	
<i>Even across disbs by Term</i>	500.00	500.00	500.00	500.00	500.00	500.00
<i>Even among first disb by Term</i>	1,000.00	0.00	1,000.00	0.00	1,000.00	0.00

Setting Up Aggregate Aid

To set up aggregate aid, use the Aggregate Level Translation component (AGGR_LVL_XREF), the Aggregate Programs component (AGGR_PROG_TABLE), the Aggregate Aid Limits component (AGGR_AID_TBL), and the Aggregate Area Translation component (SFA_AGGR_AREA_XREF).

This section provides an overview of aggregate aid and discusses how to:

- Review aggregate levels.
- Establish aggregate programs.
- Create aggregate aid limits.
- Create aggregate area translations.

Understanding Aggregate Aid

To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete aid history when determining aid eligibility. The system provides several setup options and methods to maintain aggregate or history aid to ensure that eligibility requirements and award limits are followed.

The National Student Loan Data System (NSLDS) provides an integrated, historical view of all of a student's Title IV loans and grants during all stages of the awards' life cycles – from aid approval through disbursement, any overpayments, repayment, delinquency, and closure. To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

See [Chapter 25, "Assessing Eligibility for Financial Aid," Using NSLDS Data and Processes, page 839.](#)

See [Chapter 27, "Preparing for Awarding and Packaging," Managing Aggregate Aid, page 965.](#)

Pages Used to Set Up Aggregate Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Aggregate Level Cross-Reference	AGGR_LVL_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference	Review aggregate levels and link the NSLDS Loan Year definitions from the U.S. Department of Education with your institution's specific aggregate level values and descriptions for aggregate levels.
Aggregate Program	AGGR_PROG_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Programs, Aggregate Program	Establish aggregate aid program limits for Stafford programs for both FFELP and Direct Lending.
Aggregate Aid Limit	AGGR_AID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits, Aggregate Aid Limit	Create aggregate aid limits for annual and aggregate aid limits to meet your business processing rules.
Copy Aggregate Aid Limits	AGGR_AID_COPY	Click the Copy button on the Aggregate Aid Limit page.	Copy aggregate aid limit setup from one aggregate area/aid year/effective date combination to another.
Aggregate Area-NSLDS Cross reference	SFA_AGGR_AREA_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area Translation, Aggregate Area-NSLDS Cross reference	Create translations for each of your aggregate areas to one of the NSLDS aggregate categories.

Reviewing Aggregate Levels

Access the Aggregate Level Cross-Reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference).

Aggregate Level Cross-Reference						
Aggregate Level	NSLDS Loan Year	Graduate Level	Description	Short Description		
G1	1st Year Graduate	<input checked="" type="checkbox"/>	Graduate 1st Year	Grad 1	+	-
G2	2nd Year Graduate	<input checked="" type="checkbox"/>	Graduate 2nd Year	Grad 2	+	-
G3	3rd Year Graduate	<input checked="" type="checkbox"/>	Graduate 3rd Year	Grad 3	+	-
G4	4th or more Graduate	<input checked="" type="checkbox"/>	Graduate 4th Year	Grad 4	+	-
P1	Graduate/Professional	<input checked="" type="checkbox"/>	Professional Students	Profession	+	-
P2	Graduate/Professional	<input checked="" type="checkbox"/>	Professional Students	Profession	+	-
P3	Graduate/Professional	<input checked="" type="checkbox"/>	Professional Students	Profession	+	-
P4	Graduate/Professional	<input checked="" type="checkbox"/>	Professional Students	Profession	+	-
U0	1st Year - Never Attended	<input type="checkbox"/>	Undergraduate Freshman - Never	Fresh-nev	+	-
U1	1st Year - Previously Attended	<input type="checkbox"/>	Undergraduate Freshman	Freshman	+	-
U2	2nd Year	<input type="checkbox"/>	Undergraduate Sophomore	Sophomore	+	-
U3	3rd Year	<input type="checkbox"/>	Undergraduate Junior	Junior	+	-
U4	4th Year	<input type="checkbox"/>	Undergraduate Senior	Senior	+	-
U5	5th Year+	<input type="checkbox"/>	Undergraduate Senior, 5th Year	5th Year	+	-

Aggregate Level Cross-Reference page

The system populates this table.

Aggregate Level

A two-digit alphanumeric code that you assign to describe a student's year in school. Use the Description and Short Description fields to provide a full description of the student's year in school or aggregate level. To support cumulative aggregate processing all aggregate levels must conform to a sequential structure to apply award history balances against aggregate cumulative limits. If your institution deems it necessary to introduce a new Aggregate Level than what is provided, then you must follow the same hierarchical structure that each level's two-character aggregate level collate in ascending sequence.

NSLDS Loan Year

Select the U.S. Department of Education NSLDS loan year value that you want to associate with each aggregate level appearing on the page.

NSLDS loan year values are delivered with your system as translate values. These translate values should not be changed or modified in any way.

Graduate Level

Select if the associated aggregate level/NSLDS loan year combination is a graduate or postgraduate level. This identifies a student with the associated aggregate level as either a graduate/professional or undergraduate for the purpose of determining federal eligibility.

Establishing Aggregate Programs

Access the Aggregate Program page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Programs, Aggregate Program).

Aggregate Program	
Aggregate Program:	FSTF
*Description:	<input type="text" value="Stafford FFELP Loan"/>
Short Description:	<input type="text" value="Staff-FFLP"/>

Aggregate Program page

Aid program limits link aggregate areas together to enable you to combine limits between subsidized and unsubsidized loan aggregate area limits.

The following four loan programs are the only values available for selection:

<i>Value</i>	<i>Description</i>
Direct - Stafford (DSTF)	Defines the Stafford aggregate area program subsidized and unsubsidized eligibility limits for Direct Lending. Links the Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
Direct - HEAL (DLHL)	Currently does not support aggregate aid processing for the HEAL program. Defines the HEAL Stafford aggregate area program subsidized and unsubsidized eligibility limits for Direct Lending. Links the HEAL Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
FFELP - Stafford (FSTF)	Defines the Stafford aggregate area program eligibility limits for FFELP. Links the Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.
FFELP - HEAL (FLHL)	Currently do not support aggregate aid processing for the HEAL program. Defines the HEAL Stafford aggregate area program eligibility limits for FFELP. Links the HEAL Stafford aggregate area program limitations between the subsidized and unsubsidized Stafford limits.

Although the loan programs are delivered with Financial Aid and are hard-coded, you must activate the loan program link by adding the description to each loan program and linking it to the appropriate aggregate aid limits.

Creating Aggregate Aid Limits

You have several rule options available within the aggregate aid limit setup. You can define aggregate areas for:

- Undergraduate and graduate grade level groups. For example grade levels 0 - 5 would sum toward an undergraduate limit
- Individual academic levels
- Cumulative limits across aid years

An optional Multiple Pass Processing (MPP) option automates mid-year grade level limit increases. The MPP option is currently not available for any aggregate area defined as federal Stafford Loan (Subsidized or Unsubsidized.)

Access the Aggregate Aid Limit page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits, Aggregate Aid Limit).

Aggregate Aid Limit

Aggregate Area: PELL **Aid Year:** 2010 Federal Aid Year 2009 - 2010 Copy

Find First 1 of 1 Last

'Effective Date: 08/22/2005 31 **Status:** Active ▼

'Description: Pell Grant **'Source:** Federal ▼

Long Description: Federal Pell Grant **Federal ID:** PELL Grant ▼

Aggregate Program: 🔍 **'Financial Aid Type:** Grant ▼

Multi-Pass Processing for grade level change ☐ **First Pell Percentage:** 100.00

Undergrad Lifetime: **Second Pell Percentage:** 200.00

Graduate Lifetime:

Max Terms:

Grad Limit Rule
☐ Cumulative ☒ Distinct

Level Limits					
Customize Find View All First 1-4 of 6 Last					
'Aggr Lvl	Description	Aggregate Limit	Cumulative Limit	Max Terms	
U0	Undergraduate Freshman - Never	5,350			+ -
U1	Undergraduate Freshman	5,350			+ -
U2	Undergraduate Sophomore	5,350			+ -
U3	Undergraduate Junior	5,350			+ -

Aggregate Aid Limit page

Note. The Aggregate Aid Limit setup page dynamically displays options based on the source and type of aid. For example, the options available for federal Pell Grant limits are different from the options available for the Academic Competitiveness Grant limits.

Note. To ensure that the Packaging and Awarding processes correctly track and maintain the unique academic level limits for the ACG and SMART programs, you must create five aggregate areas (ACG1, ACG2, SMART1, SMART2, and SMART3) for each aid year. If you establish only two aggregate areas (one for ACG and one for SMART), aggregate history is not correctly reflected and both the Packaging process and the NSLDS Push for Aggregates process does not work correctly. You must define five unique aggregate areas.

See [Chapter 6, "Setting Up ACG and SMART Grants," Creating Aggregate Aid Limits, page 173.](#)

Warning! Because financial aid item type information is shared across the PeopleSoft Enterprise Campus Solutions database, you must use the same aggregate area for all financial aid item types for the same type of aid. For example, if you have separate subsidized Stafford financial aid item types for graduates and undergraduates, both subsidized Stafford financial aid item types must point to the same subsidized Stafford aggregate area. You have the option to associate an aggregate area with one or many financial aid item types. If you have multiple institutions, coordinate aggregate areas and aid types to ensure that aid limits are calculated correctly for students who may be receiving aid from multiple institutions.

Aggregate Program	If this aggregate area belongs to the federal Stafford program select the appropriate aggregate program. Aggregate program limits link aggregate areas together to enable you to combine limits between subsidized and unsubsidized Stafford loan aggregate area limits.
Source	Select the funding source. You can select <i>Federal</i> , <i>Institutional</i> (institutional), <i>Other</i> , <i>Private</i> , or <i>State</i> . The value that you enter here must match the source of the financial aid item type. If it does not, you cannot associated this aggregate area with the financial aid item type, because the aggregate area does not appear as an option in the Aggregate Area field on the FA Item Type 1 page.
Federal ID	<p>This field is available only if you select <i>Federal</i> as the source. Select the value that identifies the type of federal aid the aggregate area tracks.</p> <p>Values are: <i>ACG</i> (Academic Competitiveness Grant), <i>GAANN</i> (Graduate Assistance in Areas of National Need), <i>Grad PLUS</i>, <i>HEAL</i>, <i>HPSL</i>, <i>LDS</i>, <i>Javits</i> (Jacob K. Javits Fellowship), <i>NIH</i> (National Institute of Health), <i>NSF</i> (National Science Foundation), <i>Nursing Ln</i> (nursing loan), <i>Other</i> (Other Federal Fund), <i>PCL</i>, <i>PELL Grant</i>, <i>PLUS</i>, <i>Perkins Ln</i> (Perkins Loan), <i>SEOG</i>, <i>SMART</i> (National SMART Grant), <i>Subsidized</i>, <i>TEACH</i>, <i>Unsubsidized</i>, or <i>Work Study</i>.</p> <hr/> <p>Note. You must define the federal ID for all federal aggregate areas currently used in your system. Also, be sure that your federal financial aid item types have the same federal ID as the aggregate area with which they are associated. For example, your Pell Grant financial aid item types and your Pell Grant aggregate area should both have a federal ID of <i>Pell Grant</i>. You must select the correct federal ID to have the federal aggregate area use the correct limits.</p> <hr/>
Financial Aid Type	Select the value that identifies the type of financial aid this aggregate area tracks.
Pell Grant	Select to activate Pell-only processing rules if you are defining a Pell Grant aggregate area. This check box is available only if you select <i>Grant</i> as the financial aid type.

Loan Program	Select the type of loan program tracked by the aggregate area. This field is available only if you select <i>Loan</i> as the financial aid type.
Loan Interest Attribute	<p>Indicates whether the government pays the interest on the loan. This field is available only if you select <i>Loan</i> as the financial aid type.</p> <p><i>Subsidized</i>: The government pays the interest on the loan while the student is in school, during the six-month grace period, and during any deferment periods.</p> <p><i>Unsub</i> (unsubsidized): The government does not pay the interest on the loan.</p>
Max Terms (maximum terms)	Enter the maximum number of terms that students can receive this type of aggregate aid during their lifetime, regardless of career. This is optional for most aggregate areas but should be defined and used in accordance with the requirements of a particular source of funding. This field is currently not used in processing.
Undergrad Lifetime (undergraduate lifetime)	Enter the maximum amount of this type of aggregate aid that students can receive during their undergraduate career. This is optional for many aggregates but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford.
Graduate Lifetime	<p>Enter the maximum amount of this type of aggregate aid that students can receive during their graduate career. This is optional for many aggregate areas but should be defined and used in accordance with the requirements for a particular source of funding. This field is mandatory for the following federal aggregate areas: Perkins, subsidized Stafford, and unsubsidized Stafford. The Grad Limit Rule determines whether undergraduate aid counts toward this graduate lifetime amount.</p> <p>Failure to establish undergraduate and graduate lifetime limits for Perkins, subsidized Stafford, and unsubsidized Stafford aggregate areas can result in the Packaging process awarding more than the lifetime maximum amounts the student is eligible to receive.</p>
Indep Undergrad Lifetime	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter the maximum amount that supports the Independent Undergraduate Lifetime limit for Unsubsidized loans.
Dep Undergrad Lifetime	This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter the maximum amount that supports the Dependent Undergraduate Lifetime limit for Unsubsidized loans.

Grad Limit Rule
(graduate limit rule)

Identifies whether the graduate lifetime amount should be calculated as distinct from or cumulative with the undergraduate amount.

Cumulative: The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, you use a cumulative graduate limit rule when a student is eligible for up to 40,000.00 USD in Perkins loans for both undergraduate and graduate careers, only 20,000.00 USD of which can be awarded during the undergraduate career.

If students received the full 20,000.00 USD during their undergraduate enrollment, they may not receive more than 20,000.00 USD in their graduate enrollment—totaling 40,000.00 USD between their undergraduate and graduate enrollments. No student receives more than 40,000.00 USD during undergraduate and graduate enrollments.

Total graduate amounts on the various aggregate summary pages reflect undergraduate accumulations if the aggregate area is defined as cumulative.

Distinct: The undergraduate and graduate limits are tracked separately. For example, you use a distinct graduate limit rule when a student is eligible for up to 20,000.00 USD as an undergraduate and up to 40,000.00 USD as a graduate, for a total of 60,000.00 USD.

Aggregate Level

List each aggregate level that has an annual aggregate limit. Aggregate levels and their accompanying definitions come from the Aggregate Level Cross-Reference page.

Aggregate Limit

Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated academic level within a particular aid year. This aggregate limit can set the award amount returned by the Packaging process. This field is optional for most aggregate areas. This field is mandatory for the following federal aggregate areas: Pell, SEOG, Perkins, subsidized Stafford, and unsubsidized Stafford.

Cumulative Limit

Enter the maximum amount of aggregate aid that can be awarded while the student is at the associated aggregate level. Entering a value here activates cumulative aggregate level checking and allows aggregate level limits across aid years.

For example, the federal Perkins loan program sets a limit of 8,000.00 USD for any student who has not completed two academic years of undergraduate work. In the example of the federal Perkins loan, aggregate levels U0, U1, U2 all would have a cumulative limit set to 8,000.00 USD and annual aggregate limits set to 4,000.00 USD.

Independent Annual Limit

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Independent Undergraduate Annual Aggregate Level limit for Unsubsidized loans.

Dependent Annual Limit

This field appears when Source is Federal, Financial Aid Type is Loan, and Loan Interest Attribute is Unsub. Enter maximum amount that supports the Dependent Undergraduate Annual Aggregate Level limit for Unsubsidized loans

Multi-Pass Processing mid-year level change

Select this check box to have the Awarding and Packaging processes automatically determine increased aid eligibility if multiple grade levels are present for the student.

First Pell Percentage

This field appears when the Aggregate Area is *Pell*. Enter *100.00* to ensure students are fully awarded a first Pell Grant (Pell1). If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 awards in the system) from this field.

Second Pell Percentage

This field appears when the Aggregate Area is *Pell*. Enter *200.00* to ensure students are fully awarded a second Pell Grant (Pell2). If you enter any value less than 200.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Aggregate Aid plus the Total Percent Used from prior Pell1 and Pell2 awards in the system) from this field.

Using Aggregate Areas with Multiple Pass Processing

An optional feature that you set on the Aggregate Aid Limit page is the Multi-Pass processing (MPP) option. Federally funded financial aid programs require strict eligibility requirements and borrowing limits. Most level limits increase as a student progresses in his or her studies. A student who has already borrowed up to the annual level limit within an academic year can receive additional funds if the annual level limit increases because a student advances or progresses to a new grade level with a higher-level limit. Financial Aid provides two procedural options to accommodate and award for an additional increase due to grade level changes. Option one is to use multiple or unique item types with different disbursement plans and split codes to support the additional eligibility. The other option is to select the Multi-Pass Processing check box.

Note. MPP is currently unavailable for loan programs that are originated within Financial Aid, such as Direct, FFELP, Health, and Perkins loan programs. Additional information and examples are available on how to handle the awarding loan programs across multiple NSLDS loan years.

See [Chapter 33, "Managing Special Cases in Packaging," page 1133](#).

The following table compares aggregate areas with limits to aggregate areas without limits for use in awarding item types and tracking activity:

Activity	Aggregate Areas with Level Limits	Aggregate Areas Without Aggregate Levels or Level Limits
Awarding Item Types with Aggregate Aid	<ul style="list-style-type: none"> • Must use separate financial aid item types to award for multiple aggregate levels (NSLDS loan years) in the same aid year. • Total amount of the award is restricted by NSLDS loan year. 	<ul style="list-style-type: none"> • Can award across aggregate levels (NSLDS loan years) without using separate financial aid item types for each aggregate level. • Award amount is not restricted by NSLDS loan year. <p>The only restriction on the award is the lifetime limit.</p>

Activity	Aggregate Areas with Level Limits	Aggregate Areas Without Aggregate Levels or Level Limits
Tracking Aggregate Activity	The total award is determined and tracked by the aggregate level of the first nonzero disbursement of the award.	The aggregate amount is apportioned among all aggregate levels associated with the terms spanned by the award.

Multi-Pass processing directs the Awarding and Packaging process to evaluate and produce multiple *internal* award entries, each of which reflect a separate set of scheduled disbursement amounts for every change in a student's NSLDS grade level eligibility. That is to say, this process first produces an award with scheduled disbursements according to the lowest level limit, and then generates residual disbursement amounts as the aggregate level limits are increased based on a change in the student's NSLDS level. After these individual awards have been created, the Packaging process internally consolidates all of the scheduled disbursements into a single composite award reflecting the sum total of the individual aggregate level increases for the aid year.

Note. Because split percentages here are successively reapplied during this process, the final consolidated scheduled disbursement award amounts are not necessarily an accurate reflection of the actual split percentages that would normally be expected.

The following two examples illustrate how the Packaging process proceeds if an item type is associated with an aggregate area with Multi-Pass processing selected and then with Multi-Pass processing cleared. The first example below represents an extreme student scenario to help clearly demonstrate the Multi-Pass processing logic. The example shows an increased aggregate limit for each aggregate level; this demonstrates how the Packaging process iterates through each step as the award schedule disbursement are being built up, before the disbursements are consolidated into a single award:

Example 1. Multi-Pass Processing check box selected.

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits setup

U1 = 2,000

U2 = 4,000

U3 = 5,000

First internal pass based on U1 eligibility:

Term	Aggregate Level	Award Sequence	Item	Aggregate Area	Disb Plan	Split Code	Disb Detail
Fall	U1	01	900000000810	FIRE	04	01- even	666.66
Winter	U2	01	900000000810	FIRE	04	01- even	666.67
Spring	U3	01	900000000810	FIRE	04	01- even	666.67

Second internal pass to accommodate increased eligibility from U1 to U2:

<i>Term</i>	<i>Aggregate Level</i>	<i>Award Sequence</i>	<i>Item</i>	<i>Aggregate Area</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Disb Detail</i>
Fall	U1	01	900000000810	900000000810	04	01- even	0
Winter	U2	01	900000000810	900000000810	04	01- even	1,000.00
Spring	U3	01	900000000810	900000000810	04	01- even	1,000.00

Third internal pass to accommodate increased eligibility from U2 to U3:

<i>Term</i>	<i>Aggregate Level</i>	<i>Award Sequence</i>	<i>Item</i>	<i>Aggregate Area</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Disb Detail</i>
Fall	U1	01	900000000810	FIRE	04	01- even	0
Winter	U2	01	900000000810	FIRE	04	01- even	0
Spring	U3	01	900000000810	FIRE	04	01- even	1,000.00

Final posted award: Item Type = 900000000810 5,000 USD (note overall award did not exceed the highest level limit. In this example 5,000 USD):

<i>Term</i>	<i>Student's NSLDS Level</i>	<i>Aggregate Level used to assess limit</i>	<i>Award Sequence</i>	<i>Item Type</i>	<i>Aggregate Area</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Disb Detail</i>
Fall	U1	U1	01	900000000810	FIRE	04	01- even	666.67
Winter	U2	U2	01	900000000810	FIRE	04	01- even	1,666.67
Spring	U3	U3	01	900000000810	FIRE	04	01- even	2,666.67

The Aggregate Summary page displays the aggregate level detail when MPP is selected.

Aggregate Summary

Aggregates by School

Jonanthans Nan

FAAG0080

Find

First

1 of 1

Last

Aggregate Area:

FIRE

LaMore Fire Grant

Lifetime Total

Find

First

1 of 1

Last

Aid Year:

2005

Financial Aid Year 2004-2005

Independent

	Limit	Used	Remaining
Undergraduate	40,000.00	5,000.00	35,000.00
Graduate	60,000.00	0.00	60,000.00
Term Count	0	3	

Level Totals by Aid Year

Find

First

1-3 of 3

Last

Aggregate Level	Limit	Used	Remaining	Cumulative Limit	Cumulative Used
U1	2,000	666.66	1,333.34		
U2	4,000	1,666.67	2,333.33		
U3	5,000	2,666.67	2,333.33		

Aggregate Summary page with MPP

Example 2. Multi-Pass Processing check box not selected.

Item Type = 900000000810, Mackor Scholarship Grant

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area FIRE - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

Only one pass evaluated – Final posted award: Item Type = 900000000810 2,000 USD:

Term	Student's NSLDS Level	Agg Level to assess limit	Award Seq	Item Type	Agg Area	Disb Plan	Split Code	Disb Detail
Fall	U1	U1	01	900000000810	FIRE	04	01 - even	666.67
Winter	U2	U1	01	900000000810	FIRE	04	01 - even	666.67
Spring	U3	U1	01	900000000810	FIRE	04	01 - even	666.67

The following Aggregate Summary page displays aggregate level detail when the MPP is not selected. In this example, the aggregate level U1 is used to determine the aggregate limit balance to draw eligibility from. After the award has been determined, the system spreads the disbursements for that level among all disbursement terms:

Aggregate Summary

Aggregates by School

Toni Pontifer

FAAG0081

Find

First

1 of 1

Last

Aggregate Area:

FIRE

LaMore Fire Grant

Lifetime Total

Find

First

1 of 1

Last

Aid Year:

2005

Financial Aid Year 2004-2005

Independnt

	Limit	Used	Remaining
Undergraduate	40,000.00	2,000.00	38,000.00
Graduate	60,000.00	0.00	60,000.00
Term Count	0	3	

Level Totals by Aid Year

Find

First

1 of 1

Last

Aggregate Level	Limit	Used	Remaining	Cumulative Limit	Cumulative Used
U1	2,000	2,000.00	0.00		

Aggregate Aid Summary page with MPP not selected

Note. When the Multi-Pass processing option is not selected at the aggregate aid level, you must award additional unique item types associated to the same aggregate area to award the increase in grade level eligibility.

Example 3

Item Type = 900000000815, Mackor Scholarship Grant II

Disbursement Split Code Formula = Even among first disbursement for Term

Aggregate Area - Level Limits

U1 = 2,000

U2 = 4,000

U3 = 5,000

Only one pass evaluated - Final posted award: Item Type = 900000000810 2,000 USD:

Term	Student's NSLDS Level	Aggregate Level used to assess limit	Award Sequence	Item Type	Aggregate Area	Disb Plan	Split Code	Disb Detail
Fall	U1	U1	01	9000000008 10	FIRE	04	01 - even	666.67
Winter	U2	U1	01	9000000008 10	FIRE	04	01 - even	666.67
Spring	U3	U1	01	9000000008 10	FIRE	04	01 - even	666.67

Only one pass evaluated - Final posted award: Item Type = 900000000815 2,000 USD:

Term	Student's NSLDS Level	Aggregate Level used to assess limit	Award Sequence	Item Type	Aggregate Area	Disb Plan	Split Code	Disb Detail
Fall	U1	N/A	02	90000000081 5	FIRE	04	05 - 0%	0.00
Winter	U2	U2	02	90000000081 5	FIRE	04	05 - 50%	1,000.00
Spring	U3	U2	02	90000000081 5	FIRE	04	05 - 50%	1,000.00

Only one pass evaluated - Final posted award: Item Type = 900000000816 1,000 USD:

Term	Student's NSLDS Level	Aggregate Level used to assess limit	Award Sequence	Item Type	Aggregate Area	Disb Plan	Split Code	Disb Detail
Fall	U1	N/A	03	90000000081 6	FIRE	04	04 - 0%	0.00
Winter	U2	N/A	03	90000000081 6	FIRE	04	04 - 0%	0.00
Spring	U3	U3	03	90000000081 6	FIRE	04	04 - 100%	1,000.00

The following Aggregate Summary page displays the result of using three separate financial aid item types used to accommodate and award the increase in eligibility due to NSLDS grade level changes. All of the financial aid item types must be associated to the FIRE aggregate area:

Aggregate Summary

Aggregates by School

Honphie Kwanzee

FAAG0082

Find

First

1 of 1

Last

Aggregate Area:

FIRE

LaMore Fire Grant

Lifetime Total

Find

First

1 of 1

Last

Aid Year:

2005

Financial Aid Year 2004-2005

Independent

Limit

Used

Remaining

Undergraduate

40,000.00

0.00

40,000.00

Graduate

60,000.00

0.00

60,000.00

Term Count

0

0

Level Totals by Aid Year

Find

First

1-3 of 3

Last

Aggregate Level

Limit

Used

Remaining

Cumulative Limit

Cumulative Used

U1

2,000

0.00

2,000.00

U2

4,000

0.00

4,000.00

U3

5,000

0.00

5,000.00

Aggregate Summary page with results of three FA item types

Creating Aggregate Area Translations

Access the Aggregate Area-NSLDS Cross-reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Area Translation, Aggregate Area-NSLDS Cross reference).

Aggregate Area-NSLDS Cross-reference				
Find View 10 First 1-11 of 11 Last				
*Aggregate Area	Description	*NSLDS Aggregate		
ACG1	ACG1	ACG	+	-
ACG2	ACG2	ACG	+	-
PELL	Pell Grant	Pell	+	-
PERKINS	Carl D. Perkins Loan - ELO	Perkins	+	-
SEOG	SEOG	SEOG	+	-
SMART1	SMART1	NSG	+	-
SMART2	SMART2	NSG	+	-
SMART3	SMART 3	NSG	+	-
STAFFORD	Stafford Loan - Subsidized	Subsidized	+	-
TEACH	TEACH	TEACH	+	-
UNSUB	FFELP - Unsubsidized Loan	Unsub	+	-

Aggregate Area-NSLDS Cross-reference page

To use NSLDS data in the Awarding and Packaging processes, you must complete this setup before loading and pushing of NSLDS from the ISIR, FAH, or TSM data files into packaging aggregate tables.

Aggregate Area

Select the aggregate area to which you want to map an NSLDS aggregate category. If you have created multiple aggregate areas to correspond to a single NSLDS aggregate category, then enter the same number of instances of aggregate areas to correspond to the NSLDS aggregate category.

Note. You must set up separate ACG and SMART aggregate areas to support their unique level limits.

See [Chapter 6, "Setting Up ACG and SMART Grants," Mapping Aggregate Area Limits to NSLDS Aggregate Categories, page 174.](#)

NSLDS Aggregate

For each aggregate area, select one of the available NSLDS aggregate categories. The aggregate programs used by the NSLDS Aggregate Push are: *ACG* (Academic Competitiveness Grant), *NSG* (National SMART Grant), *Pell*, *Perkins* (Perkins Loan), *SEOG*, *Subsidized*, *TEACH*, or *Unsub*.

Setting Up Award Messages

To set up award messages, use the Award Messages component (AWARD_MESSAGES).

Award messages can be linked to financial aid item types and then included on Financial Aid Notification (FAN) letters to students. The delivered setID *MODEL* provides many of the basic award messages needed. However, you can add new messages or modify existing messages.

This section discusses how to define award messages.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Disbursement and Anticipated Aid, page 123](#)

Pages Used to Set Up Award Messages

Page Name	Definition Name	Navigation	Usage
Award Messages	AWRD_MESSAGE_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Award Messages, Award Messages	Define award messages that can be linked to financial aid item types.
Copy Award Messages	AWD_MESSAGE_COPY	Click the Copy button on the Award Messages page.	Copy award messages from one setID and aid year combination to another.

Defining Award Messages

Access the Award Messages page (Set Up SACR, Product Related, Financial Aid, Awards, Award Messages, Award Messages).

Award Messages

SetID: PSUNV
Aid Year: 2006 Financial Aid Year 2005-2006 Copy

Find | View All First 2-5 of 15 Last

*Code:	Description:	
FSLN	You have been awarded an FASS LOAN. You must (a) subscribe to the conditions of this loan for continued eligibility of this loan; (b) review the enclosed Promissory Note	+ -
FSWK	You have been awarded a FASS Work Program opportunity. Please report to the Student Employment Placement office prior to 9/18/02 for your placement interview.	+ -
FWS	You have been awarded from the Federal Work Study Program. Please report to the Student Employment Placement office prior to 10/1/97 for your placement interview. All	+ -
OTHR	You have received additional resources administered by an outside agency. Although this resource must be considered for calculation of your financial aid award package,	+ -

Award Messages page

For your setID and current processing aid year, create a financial aid message code of OTHR with a description that specifies that the item type be printed as part of Other Resources and to check the Estimate of Resources section of the notification.

Code	Enter the four-character code that identifies the award message. This field is alphanumeric, and you can use less than four characters for the code.
Description	Enter the text of the award message. The message in this field is printed on the student's FAN letter.

Setting Up Loan Fees

To set up loan fees, use the Loan Fee Setup component (LOAN_FEE_TABLE).

Set up loan fees in the Loan Fee Table to ensure that the correct loan fees are deducted from each loan financial aid item type at the time of awarding. Loan fees are origination and insurance fees that are deducted from the gross amount of the loan. When defining a loan financial aid item type, attach the appropriate loan fees on the FA Item Type 6 page. Remember to create loan fee information for all loan types at your institution.

This section discusses how to create loan fees.

Page Used to Add Loan Fees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Fee Table	LOAN_FEE_TABLE	Set up SACR, Product Related, Financial Aid, Awards, Loan Fee Setup, Loan Fee Table	Create and maintain loan fees.

Creating Loan Fees

Access the Loan Fee Table page (Set up SACR, Product Related, Financial Aid, Awards, Loan Fee Setup, Loan Fee Table).

Loan Fee Table			
Aid Year:	2008	SetID:	PSUNV
Loan Fee:	OR1		
Find View All First 1 of 1 Last			
Effective Date:	01/01/1900	Status:	Active
Description:	FFEL Origination	Short Desc:	FFEL STAF
Loan Fee Type:	P Processing		
Loan Fee Option:	Percentage		
Loan Fee Rule:	Weighted Across Disbursements		
Loan Fee Percent:	2.97 %	Loan Fee Amount:	\$0.00

Loan Fee Table page

Loan Fee Type Select the value that indicates the purpose of the loan fee. Be sure to select *R—Rebate* if the loan fee is an interest rebate, used for the Direct Loan interest rebate.

Loan Fee Option Select the value that indicates how the amount of the loan fee is determined.

Flat: The loan fee is a flat amount. If you select this value, you must select a Loan Fee Rule and enter the loan fee amount.

Percentage: The amount of the loan fee is a percentage of the student's award amount. If you select this value, you must indicate the percentage in the Loan Fee Percent field.

Loan Fee Rule This field is available only if you select *Flat* in the Loan Fee Option field. The loan fee rule determines how the Packaging process distributes the loan fee amount among disbursements.

All in 1st Disbursement: The entire loan fee amount is subtracted from the first disbursement.

Weighted Across Disbursements: The loan fee amount is split among the disbursements according to the disbursement split code percentages.

Loan fee options and loan fee rules are delivered with the system as translate values that cannot be modified in any way. The Packaging process bases certain calculations on these values and changing them would have unforeseen consequences.

Loan Fee Percent This field is available only if you select *Percentage* in the Loan Fee Option field. The loan fee amount is this percentage of the total award amount.

Loan Fee Amount This field is available only if you select *Flat* in the Loan Fee Option field. Enter the total loan fee amount.

Note. This is no longer applicable in the 9.0 system.

Processing Direct Loan Interest Rebate

The up-front Direct Loan interest rebate amount of 1.5 percent of the gross disbursement is calculated at the disbursement level for each Direct Subsidized, Direct Unsubsidized, and Direct PLUS loan. The rebate amount is added after the 3 percent loan fee is subtracted from the gross disbursement amount. For example, a student receives a Direct Loan of 1,000.00 USD for the fall 2004 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent rebate of 15.00 USD is added back into the loan.

The Packaging process calculates loan fee amounts for each loan award in a student's financial aid package. These loan fee amounts are set up on the Loan Fee Table page and can be a flat fee or a percentage of the award amount. When setting up the loan fee for the interest rebate feature, you must establish the interest rebate with a loan fee type of *R—Rebate*. Each loan financial aid item type can have various loan fees associated with it.

The Packaging process evaluates the loan fee type. The interest rebate loan fee type is processed differently than other loan fee types. The system processes interest rebate loan fee types using the Department of Education's recommended formula. An interest rebate loan fee is processed after all other loan fees have been applied to the loan award.

The interest rebate amount, as calculated by the Packaging process, is written to a field on the various packaging and awarding tables. Each Direct Loan financial aid item type disbursement balance has an associated interest rebate amount and an associated loan fee amount.

See Also

Chapter 5, "Setting Up Packaging Basics," Attaching Loan Fees, page 129

Defining Financial Aid Item Types

To set up financial aid item types, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM).

In the Financial Aid Item Types component you can define parameters for your financial aid item types. In addition to awarding financial aid item types, you can set up Grants Administration and Payment System (GAP) financial aid item types.

This section discusses how to:

- Define financial aid item type descriptions.
- View item type detail.
- Define awarding and rounding rules.
- Define disbursement and anticipated aid.
- Set term minimum and maximum award limits.
- Define default disbursement plans and split codes.

- Attach loan fees.
- Define GAP financial aid item types.

See Also

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup,"
Setting Up Item Types and Item Type Groups

Pages Used to Define Financial Aid Item Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
Item Type Detail	ITEM_TYPE_TBL_SEC	Click the description of the item type on the FA Item Type 1 page.	View item type detail information from the item type table for this financial aid item type.
Copy FA Item Type Data	ITEM_TYPE_FA_COPY	Click the Copy button on the FA Item Type 1 page.	Copy financial aid item type setup data from one setID, item type, aid year, and effective date combination to another.
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.
Equation Dtl (equation detail)	PKG_EQUATION_SEC	Click the Equation Detail link on the FA Item Type 2 page.	View the packaging equation attached to the Selection Criteria field. Note. The Equation Detail link only appears if you have a value selected in the Selection Criteria field.

Page Name	Definition Name	Navigation	Usage
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.
FA Item Type 6	ITEM_TYP_FA_LN_FEE	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6	Attach loan fee codes for loan item types.

Defining Financial Aid Item Type Descriptions

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

FA Item Type 1 FA Item Type 2 FA Item Type 3 FA Item Type 4 FA Item Type 5 FA Item Type 6

SetID: PSUNV
Item Type: 900000000108 [Second Pell Grant](#)
Aid Year: 2010 Federal Aid Year 2009 - 2010

FA Item Type Setup Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active Copy
Description: Second Pell Grant Short Description: SecondPell
Financial Aid Type: Grant Source: Federal Federal ID: PELL Grant
Aggregate Area: PELL Institution Reporting Cd: Additional Pell ☒
Comments:

FA Item Type 1 page

Click the description of the item type to access the Item Type Detail page and view information from the item type table including the effective date and minimum and maximum transaction amounts.

Financial Aid Type Select the type of financial aid or category of funding.

Source Select the source of this financial aid funding.

Federal ID This field is available only if you select *Federal* as the source. Select the federal program associated with this item type. To have the correct federal program rules applied during financial aid processing, you must select the correct federal program in this field.

Values are: *ACG* (Academic Competitiveness Grant), *GAANN* (Graduate Assistance in Areas of National Need), *Grad PLUS*, *HEAL*, *HPSL*, *LDS*, *Javits* (Jacob K. Javits Fellowship), *NIH* (National Institute of Health), *NSF* (National Science Foundation), *Nursing Ln* (nursing loan), *Other* (Other Federal Fund), *PCL*, *PELL Grant*, *PLUS*, *Perkins Ln* (Perkins Loan), *SEOG*, *SMART* (National SMART Grant), *Subsidized*, *TEACH*, *Unsubsidized*, or *Work Study*.

Aggregate Area Select an aggregate area to associate with this item type if you want to limit or track aggregate aid for this financial aid item type. Each financial aid item type can be associated with only one aggregate area, but an aggregate area may be composed of several financial aid item types.

Institution Reporting Cd Enter a user-defined institutional reporting code for this item type. This optional field is available for your institutional reporting needs.
(institution reporting code)

MPN Required

This field appears when you select a Federal ID of *Perkins Ln.* Select to indicate that an MPN is required for the financial aid item type awarded to the student. The Perkins MPN electronic signature and print processes use this flag to determine which financial aid item types should be assessed if an MPN is required.

If selected, the financial aid disbursement authorization process requires a valid Perkins MPN before the award can be authorized and disbursed.

Additional Pell

This check box appears when you select a Federal ID of *PELL Grant*. Select to indicate that this financial aid item type represents a Pell2 (second full Pell Grant).

Note. It is recommended that you create new item types and corresponding financial aid item types when enabling the new Perkins MPN process. This enables you to track new Perkins MPNs and does not have a negative effect on those individuals who currently have a signed and valid Perkins MPN on file.

Viewing Item Type Detail

Access the Item Type Detail page (click the description of the item type on the FA Item Type 1 page).

Item Type Detail			
Effective Date:	01/01/1900	Charge Priority List:	ALL
Minimum Transaction Amount:	1.00	<input checked="" type="checkbox"/> Refundable Indicator	
Maximum Transaction Amount:	4,000.00	<input checked="" type="checkbox"/> Taxable	

Item Type Detail page

Charge Priority List

Identifies the charge priority list assigned to the item type. The system uses charge priority lists for financial aid item types that have payment application restrictions. Charge priority lists tell the system how to distribute excess funds and the types of charges towards which the item type can be applied.

Minimum Transaction Amount and Maximum Transaction Amount

Displays the minimum and maximum annual amount established for this item type on the Item Type Amount Edits page.

Refundable Indicator

Indicates whether the item type can be refunded later. This value comes from the Item Type - Miscellaneous Edits page.

Taxable

PeopleSoft Enterprise Payroll uses this field to calculate withholdings on awards of this item type. If you do not use PeopleSoft Payroll, clear this check box. This value comes from the Item Type - Miscellaneous Edits page.

See Also

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup," Defining Charge Priority List Rules

Defining Awarding and Rounding Rules

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2).

The screenshot displays the 'FA Item Type 2' page. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 2' selected. Below the tabs, the following information is displayed:

- SetID:** PSUNV
- Item Type:** 900000000323 [Federal Perkins Loan - MPN](#)
- Aid Year:** 2008 Federal Aid Year 2007 - 2008

The main section is titled 'Awarding Rules' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The 'Awarding Rules' section contains the following fields and options:

- Effective Date:** 01/01/1900
- Status:** Active
- Fed/Inst Affected:** Both Fed and Inst (dropdown)
- Meet Need/Cost:** Straight Need/Cost (dropdown)
- Packaging Methodology:** Federal Methodology (dropdown)
- Selection Criteria:** (text input with search icon)

To the right of the 'Awarding Rules' section is a 'Rounding Rules' section with the following fields and options:

- Rounding Option:** Dollar (dropdown)
- Round Direction:** Nearest (dropdown)
- Award Remainder Rule:** 1st-Cents (dropdown)
- Fee Remainder Rule:** (dropdown)
- ☐ Truncate Fees

At the bottom of the page, there are several checkboxes for awarding rules:

- ☒ Need Based
- ☒ Auto Package
- ☐ Self Help Award
- ☐ Package Only Once
- ☐ Lock Award
- ☐ Equity Award
- ☐ Don't Repackage
- ☒ Disbursement Protection
- ☐ Adjust while in transit

FA Item Type 2 page

Awarding Rules

Fed/Inst Affected
(federal/institutional affected)

Select which need this financial aid item type reduces.

Federal Only: This financial aid item type should reduce *only* federal need and not reduce institutional need.

Both Fed and Inst (both federal and institutional): This financial aid item type should reduce federal *and* institutional need. If your institution is using institutional awarding, select this value.

Meet Need/Cost

Select how need—based on your selection the Fed/Inst Affected field—is adjusted or reduced when you award this financial aid item type. Financial Aid maintains an unmet need balance (COA minus EFC minus aid awarded) and an unmet COA balance (COA minus aid awarded). Select a value to determine how awards of this financial aid item type affect these two balances:

Conditional: Indicates an award made without regard to budget or need if federal aid has not been awarded at the time of this award. However, if federal aid precedes this award, conditional awards behave like special need/cost awards.

Cost Only: The awarded amount affects only the unmet COA balance.

Need Only: The awarded amount affects only the unmet need balance.

No Effect: The awarded amount does not affect the unmet need or unmet COA balances. Ensure that you understand the results before using this option.

Special Need/Cost: The Packaging process first determines whether unmet need exists. The system always reduces unmet need first. Then the process compares the remaining unmet COA against the student's EFC and awards up to the lesser of the two. This is the preferred attribute for unsubsidized Stafford and PLUS loans. Special need/cost aid reduces both the unmet need and unmet COA balances.

Straight Need/Cost: The awarded amount affects both the unmet need and unmet COA balances.

Packaging Methodology

Select the need—federal or institutional—the Packaging process should use to determine the amount for awards of this item type.

Federal Methodology: The Packaging process uses FM need to determine the award amount. FM need is the federal cost of attendance minus the student's FM EFC. Use this attribute for federal item types.

Institutional Methodology: The Packaging process uses IM need to determine the award amount. IM need is the institutional cost of attendance minus the student's IM EFC.

Note. If you use institutional methodology to estimate federal awards prior to the beginning of the federal awarding cycle (January 1st), selecting *Institutional Methodology* for federal awards enables a more realistic remaining need calculation. The remaining need calculation is more realistic because you have an institutional EFC but no federal EFC, and, therefore, the system uses IM need rather than FM need. You must effective date these federal financial aid item types so that beginning January 1, the packaging methodology is *Federal Methodology* to ensure the system uses FM need rather than IM need when awarding federal sources of aid.

Selection Criteria	<p>To use an equation to select a population of students eligible to receive this item type, select the equation here. For example, you define a particular population of students to be awarded, such as students who have exceptional grade point averages and whose FM need is high. You create a packaging equation to select this student group, then link this student group to this item type by selecting the equation in this field.</p> <p>The Equation Detail link appears only after you select an equation.</p> <p>See Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Viewing and Editing Equations, page 229.</p>
Need Based	<p>Select if need is considered when awarding this item type. This check box is used for reporting only.</p>
Equity Award	<p>Select to evaluate this financial aid item type as an equity award. Equity awards are considered to be "free money" to students such as grants or scholarships. Financial aid item types defined as equity awards adhere to the equity limit established in a packaging plan where the equity financial aid item type is a packaging rule.</p> <p>See Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Defining Packaging Equity Limits and Offsets, page 253.</p>
Auto Package	<p>Select to have the financial aid item type available for selection in automated packaging—Auto Packaging and Mass Packaging. To have this financial aid item type available for use in packaging plans, you must select this check box.</p>
Disbursement Protection	<p>If this check box is selected, the Packaging process protects the disbursed portion of this financial aid item type from being reduced during repackaging sessions using any packaging method—Auto, Mass, or Manual Packaging. After you enable disbursement protection, an award of this financial aid item type cannot fall below the disbursed amount. When using manual packaging, especially for custom splits, the accept balance cannot be less than the disbursed balance on the Award Disbursement Detail page. The only way to reduce a disbursed amount when disbursement protection is active is to adjust the award on the Professional Judgement page.</p> <p>Do not activate disbursement protection for Direct Loan financial aid item types. The treatment of Direct Loan adjustments is similar to the processing behavior invoked by disbursement protection.</p> <hr/> <p>Important! If you do not select this check box, disbursed amounts can be reduced and recalculated.</p> <hr/> <p>See Chapter 33, "Managing Special Cases in Packaging," Protecting Disbursements During Awarding, page 1178.</p>
Self Help Award	<p>Select if this item type is work-study or a loan. This field is for informational or reporting purposes only.</p>

Lock Award

Select if you want to lock awards of this financial aid item type automatically when awarding as part of a packaging plan. Locking an award prevents Auto and Mass Packaging from automatically canceling this award. All awards that you manually enter are automatically locked, whether this check box is selected or not.

See [Chapter 28, "Awarding and Packaging Students," Using Auto Packaging and Auto Select Packaging, page 995.](#)

Package Only Once

Select to prevent this financial aid item type from being awarded more than once to the student for the aid year for the same career, even if the student is eligible to receive the award during a subsequent Packaging process.

For this check box to function properly, you must keep the following in mind:

To preserve the award made with the first instance of the financial aid item type, you must lock the first instance of the item type, selecting the Lock check box on the award entry page. If the first instance of the financial aid item type is not locked on the award entry page, the first instance of the financial aid item type is canceled and may be replaced by a future instance of the financial aid item type. Although a financial aid item type is not awarded more than once, unless you lock the first instance, it can be replaced by any future instances.

If the student has multiple careers across terms—Undergraduate for Term 1 and Graduate for Term 2—the Package Only Once check box does not prevent a financial aid item type from being awarded once for each career for the student. This could cause the financial aid item type to be awarded more than once in the aid year, but only once for each career. This is because the Package Only Once attribute is not evaluated when the first career's awards are passed to the second career as passive awards.

The Package Only Once attribute does not work if two instances of the financial aid item type exist within a packaging plan. This is because the first instance is not yet posted before the second instance is considered. In this case, both instances are awarded if the student is eligible.

Auto assign lowest sequence

This check box only appears if Meet Need/Cost is *Conditional*. Select to have awards of this financial aid item type automatically assigned the lowest possible sequence number in the student's financial aid package when you enter the conditional award on the Manual Student Packaging page *only*. For example, this check box is selected, and a student's package already contains three awards with sequence numbers of 10, 20, and 30. You enter a new conditional award, and the system assigns the conditional award a sequence number of 09. If the check box is cleared, the system assigns the new conditional award a sequence number of 40.

Automatically assigning conditional awards the lowest sequence number is useful when you have individuals outside the financial aid office (such as departmental office staff) entering conditional awards (like departmental scholarships) on the Manual Student Packaging page. The financial aid office staff can then review the student's package to see if the conditional award affects the student's need with other forms of aid.

If the conditional award entered by individuals outside the financial aid office is not automatically assigned the lowest sequence number, the student's need may be met before the Packaging process reaches the conditional award. Consequently, the student may not receive the conditional award.

Equation Detail

Click to access the Equation Summary page to view the packaging equation attached to the selection criteria.

Rounding Rules**Rounding Option**

Select how you want awards of this financial aid item type rounded when rounding is necessary. Values are:

10 dollars: The Packaging process rounds award amounts to the nearest 10-dollar amount.

100 dollars: The Packaging process rounds award amounts to the nearest 100-dollar amount.

5 dollars: The Packaging process rounds award amounts to the nearest 5-dollar amount.

Dollar: The Packaging process rounds award amounts to the nearest dollar.

None: The Packaging process does not round award amounts for this financial aid item type.

Round Direction

Select the direction you want the Packaging process to use when rounding award amounts. If you select *None* as the rounding option, do not select a round direction.

Down to: The Packaging process truncates, or rounds, the award amount down to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option.

Nearest: The Packaging process rounds the award to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option. The process determines the dollar amount to which the award amount is closest, and then rounds up or down accordingly.

Up to: The Packaging process rounds the award amount up to the nearest dollar, 5 dollar, 10 dollar, or 100 dollar amount, depending on the selected rounding option.

Award Remainder Rule

When an award is rounded and split across disbursements, there can be an odd dollar or cent amount left over. The award remainder rule indicates where you want the Packaging process to place odd amounts.

1st-Cents: If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

1st-Dllrs (1st dollars): If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

Last-Cents: If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Last-Dllrs (last dollars): If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Fee Remainder Rule

This field is available only for financial aid item types with a financial aid type of *Loan* on the FA Item Type 1 page. Select how the Packaging process handles remaining dollars or cents after loan fees have been applied to an award. You can either select a value in this field, or you can select the Truncate Fees check box, but not both.

First Disb – Cents: If cents remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

First Disb – Dollars: If dollars remain, the Packaging process assigns the remaining amount to the first scheduled disbursement.

Last Disb – Cents: If cents remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Last Disb – Dollars: If dollars remain, the Packaging process assigns the remaining amount to the last scheduled disbursement.

Truncate Fees

Select to disregard any cents left over after the Packaging process has applied loan fees to the award amount. Use only for Direct Lending loans. You can select this check box, or you can select a value in the Fee Remainder Rule field, but not both.

Defining Disbursement and Anticipated Aid

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

FA Item Type 1		FA Item Type 2		FA Item Type 3		FA Item Type 4		FA Item Type 5		FA Item Type 6		
SetID:	PSUNV											
Item Type:	900000000323 Federal Perkins Loan - MPN											
Aid Year:	2008 Federal Aid Year 2007 - 2008											
Award Attributes Find View All First 1 of 1 Last												
Effective Date:	01/01/1900			Status:	Active							
Pass Anticipated Aid:	Accepted			Anticip Aid Expiration Days:	30							
Disbursement Method:	Stdnt Acct			Auto Cancel Item Type:								
<input type="checkbox"/> Signature Required <input type="checkbox"/> Manual Authorization <input type="checkbox"/> Include in Transcript												
Print Letter Option:	Print			<input checked="" type="radio"/> Print as Award Item <input type="radio"/> Print as Other Resource				Self Service Actions <input checked="" type="checkbox"/> Accept <input checked="" type="checkbox"/> Reduce <input checked="" type="checkbox"/> Decline				
Award Letter Print:												
Award Message:	PERK											

FA Item Type 3 page

Pass Anticipated Aid

Select when an award appears as anticipated aid in the student's Student Financials record. Awards appear as anticipated aid on the student's account when the status of the award matches the value in this field. For example, if you select *Accepted*, and an award of this financial aid item type has a status of *Accepted*, the award appears as anticipated aid on the student's bill. For loan awards, the net amount of the loan (award amount minus any loan fee adjustments) is displayed as anticipated aid.

Accepted: Awards of this financial aid item type with a status of accepted or authorized appear as anticipated aid.

Authorized: Awards of this financial aid item type with a status of authorized appear as anticipated aid.

None: Awards of this financial aid item type never appear as anticipated aid. For example, you do not want work study to appear as anticipated aid in this system because work study funds are not allocated to the student until the money is earned. Therefore, you select *None* for the work study financial aid item type.

Offered: Awards of this financial aid item type with a status of offered, accepted, or authorized appear as anticipated aid.

Anticip Aid Expiration Days (anticipated aid expiration days)

An expiration date accompanies each anticipated aid amount and enables you to "expire" a financial aid item type if the criteria for its awarding are not met by the date you assign. The number of days you enter in this field works with several other dates on the anticipated aid record to determine when to expire the anticipated aid. *Date* is the date the award becomes anticipated aid. *Apply Date* is the date you are requesting to apply the disbursement to the student's account. The expiration date is the later of the two calculated dates:

Date plus the number of anticipated aid expiration days

Or

Apply Date plus the number of anticipated aid expiration days

Print as Other Resource

In addition to veteran's benefits and Americorp benefits, you can identify another resource item type that prints as another resource under the award section of the FE FAN. The system does not count this other resource amount in the annual and term totals. It displays this amount in the estimated resources section of the FE FAN as other resources. Select to print the other resource item type under the award section on the FAN.

The following table provides an example of how the expiration date is determined—for the fall 2004 term, in this example:

<i>Expiration Days</i>	<i>Date</i>	<i>Apply Date</i>	<i>Expiration Date</i>
45	02/18/2004	08/14/2004	09/29/2004
45	07/30/2004	08/14/2004	09/29/2004
45	08/30/2004	08/14/2004	10/14/2004

Disbursement Method

Identify where Financial Aid transfers any disbursed financial aid amounts.

No: The funds are not disbursed into the student's Student Financials account because the student is paid directly. Work-study financial aid item types use this disbursement method.

Stdnt Acct (student account): The disbursed amount is transferred to the student's account in Student Financials.

Auto Cancel Item Type

If an existing award of a particular financial aid item type should be automatically canceled when an award of this financial aid item type is subsequently awarded manually on either the Student Aid Package page or the Manual Student Packaging page, enter the financial aid item type to be canceled in this field. This enables you to award using an *estimated* financial aid item type and then replace it with the *actual* financial aid item type when funds have been approved or certified. For example, you may have estimated a state grant and then replaced the award with an actual state grant award. This feature functions only during manual awarding. It does not work with auto packaging or mass packaging.

Signature Required	Select if you require a signature from the student for the student to receive this particular financial aid item type as part of an award. For example, you could use this for a loan where the student must sign a promissory note before any money is disbursed. This field is for informational purposes only; it has no effect on loan processing.
Manual Authorization	Select to disburse this financial aid item type using manual authorization. The system cannot authorize this financial aid item type for disbursement using the background authorization process if you select this check box. One use of this feature is for scholarships where you must review a roster or have checks that must be verified prior to authorization of the aid.
Include in Transcript	Indicates that the financial aid item type should appear on the financial aid transcript (FAT). This field is not supported because U.S. Department of Education no longer supports the FAT.
Print Letter Option	<p>Select whether to print awards of this financial aid item type on the FAN letter or a custom letter, or to not print notification of the award at all.</p> <p><i>Custom:</i> Awards of this financial aid item type are printed in an institutionally configured standard letter of your choice rather than the PeopleSoft delivered FAN letter. If you select this value, you must specify a standard letter code value in the Award Letter Print field.</p> <p>As an example, you may want to generate a specific scholarship letter for the JP Memorial award recipients. The custom option enables you to modify the letter by inserting the JP Memorial awarded amount within the letter, which you must specify by its standard letter code in the Award Letter Print field.</p> <p><i>Never:</i> Awards of this financial aid item type are never printed in the FAN letter or an institutionally modified letter.</p> <p><i>Print:</i> Awards of this financial aid item type are printed on the FAN letter. You must also indicate whether awards of this financial aid item type should be treated as award items or as other resources—such as student contribution and parent contribution—using the Print as Award Item and Other Resource options.</p>
Print as Award Item	Available only if you select <i>Print</i> in the Print Letter Option field. Select to have awards of this financial aid item type included in the total aid offered amount on the FAN letter and listed as awards.
Other Resource	Available only if you select <i>Print</i> in the Print Letter Option field. Select to have awards of this financial aid item type considered as resources and included in the other resources total on the FAN letter, but not listed as awards.
Award Letter Print	Available only if you select <i>Custom</i> in the Print Letter Option field. Select the standard letter code of the letter to modify using the award amount.
Award Message	(Optional) To have a specific award message print on an award notification or a custom letter for awards of this financial aid item type, select the award message in this field. The award messages available for selection are defined on the Setting Up Award Messages page.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Communications," Defining Letter Codes

PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, "Setting Up Student Financials Self Service," Setting Up Institution Sets

Setting Term Minimum and Maximum Award Limits

Access the FA Item Type 4 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4).

The screenshot displays the 'FA Item Type 4' page in a web application. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 4' currently selected. Below the tabs, the following information is displayed:

- SetID:** PSUNV
- Item Type:** 900000000323 [Federal Perkins Loan - MPN](#)
- Aid Year:** 2008 Federal Aid Year 2007 - 2008

Below this information is a section titled 'Award Limits by Term Category'. It includes a 'Find' button, 'View All', and pagination controls showing '1 of 1' records. The 'Effective Date' is 01/01/1900 and the 'Status' is Active. A table lists the award limits for different term categories:

*Term Category	*Minimum	*Maximum		
Regular Term	250.00	3,000.00	+	-
Summer Term	250.00	3,000.00	+	-

FA Item Type 4 page

Term Category

Select the term type for which you are specifying minimum and maximum award limits. The automated Packaging process uses the financial aid item type term limits from this page, annual item type limits from the Item Type page, fiscal limits, financial aid item type annual limits from the packaging plan, and, if defined, any aggregate area limits to determine the correct amount to award. Term category values are delivered with your system as translate values. These values are used extensively in Student Records. Coordinate any revision of these values with student records staff.

Insert additional rows to add more term categories.

Minimum and Maximum

Enter the minimum and maximum award limits for terms of the associated term category. Remember that this amount is per term, not per aid year. To ensure that the Packaging process processes without fault, minimums should not be less than 1.00 USD. You must set this field to a nonzero amount for your GAP financial aid item types.

If the maximum award limit is 400.00 USD (for a term), the item type limit is 1,000.00 USD (for the aid year), and your institution has two semester terms, the maximum award for this financial aid item type is 800.00 USD (400.00 USD for each term). If your institution has three quarter terms, the maximum amount based on the term maximum amount is 1,200.00 USD (400.00 USD for three terms) but this exceeds the item type limit for the aid year. The actual maximum for this financial aid item type is 1,000.00 USD—the item type limit for the aid year. The financial aid item type term maximum cannot override the item type maximum.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions," Defining Terms

Defining Default Disbursement Plans and Split Codes

Access the FA Item Type 5 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5).

The screenshot displays the 'FA Item Type 5' configuration page. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 5' selected. Below the tabs, the following information is displayed:

- SetID:** PSUNV
- Item Type:** 9000000000323 [Federal Perkins Loan - MPN](#)
- Aid Year:** 2008 Federal Aid Year 2007 - 2008

The **Disbursement Rules** section shows:

- Effective Date:** 01/01/1900
- Status:** Active
- Missing Term Enrollment:** ☐ Split evenly across valid term

The **Default Disbursement Splits** section includes a table with the following columns: *Academic Institution, *Academic Career, *Disbursement Plan, and *Split Code. The table contains three rows of data:

*Academic Institution	*Academic Career	*Disbursement Plan	*Split Code		
PSUNV	GRAD	01	01	+	-
PSUNV	UENG	02	01	+	-
PSUNV	UGRD	01	01	+	-

FA Item Type 5 page

Disbursement Rules

Disbursement plans determine the disbursements across terms, award period, and aid year, but students may not necessarily attend all terms defined for the disbursement plan. The Missing Term Enrollment field specifies if disbursements should be split evenly among the remaining terms for which the student is actually enrolled. Select the Split evenly across valid term check box to have the award split among the remaining enrolled terms for the student. For example, if the disbursement plan is for fall, winter, and spring quarters, but the student is only enrolled for fall and spring with the Split evenly across valid term check box selected, the award amount is split evenly between the fall and spring terms.

Clear the Split evenly across valid term check box to have the award amount split according to the relative percentages of the valid terms. For example, a disbursement plan calls for a split of 20%/40%/40% among three terms, but only the first two terms are valid for the student. To determine the relative percentages of the first two terms, the system first adds the disbursement split percentages for the two valid terms ($20\% + 40\% = 60\%$). Then the system divides each term's original percentage by the new total percentage (60%). So the first term has a relative percentage of 33.33% ($20\% / 60\% = .3333$) and the second term has a relative percentage of 66.67% ($40\% / 60\% = .6667$). The Packaging process then determines each term's award amount by multiplying the total award amount by each term's relative percentage.

Note. The Split evenly across valid term check box is not available for Pell Grants because Pell amounts for each term are derived at the term level based on financial aid term data, federal EFC, and Pell COA and cannot be just distributed evenly among the valid enrollment terms.

Note. For Pell Grant item types in the 2010 and future aid years, select a Default Disbursement Plan that encompasses *all* terms (Academic and Non-Standard) in which the student may receive a Pell Grant. Although Packaging does not use the Split Code specified here when calculating Pell Grant, a default Split Code is required.

See [Chapter 29, "Awarding Pell Grants," Pell Grants for Non-standard Terms and Two Pell Grants in an Aid Year, page 1050.](#)

Default Disbursement Splits

Defining default disbursement plans and split codes decreases the amount of data entry during the establishment of packaging plans and on the award entry pages. You can establish different default disbursement plans and split codes for each career. Insert a row for additional institution/career combinations.

Disbursement Plan	Enter the default disbursement plan for the financial aid item type when awarded for the selected career and institution.
Split Code	Enter the default split code for the financial aid item type when awarded for the selected career and institution.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Default Disbursement Plans and Split Codes, page 127](#)

Attaching Loan Fees

Access the FA Item Type 6 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6).

The screenshot displays the 'FA Item Type 6' page. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 6' selected. Below the tabs, the following information is shown:

- SetID:** PSUNV
- Item Type:** 900000000323 [Federal Perkins Loan - MPN](#)
- Aid Year:** 2008 Federal Aid Year 2007 - 2008

The **Loan Program** section includes a 'Find | View All' link and pagination 'First 1 of 1 Last'. It shows:

- Effective Date:** 01/01/1900
- Status:** Active
- Loan Program:** Perkins (dropdown menu)
- Loan Interest Attribute:** Subsidized (dropdown menu)

The **Loan Fees** section includes a 'Customize | Find' link and pagination 'First 1 of 1 Last'. It contains a table with the following columns:

	*Loan Fee	Loan Fee Type	Loan Fee Rule	Loan Fee Option	Fee Percent	Flat Fee	
1	<input type="text"/>						

FA Item Type 6 page

Loan Program

If the loan financial aid item type is associated with an aggregate area on the FA Item Type 1 page, the Loan Program and Loan Interest Attribute fields display the values you selected in the corresponding fields on the Aggregate Aid Limit page for the associated aggregate area. You cannot change these values on this page. If the loan financial aid item type is not associated with an aggregate area, you can select the appropriate value for these two fields on this page.

Loan Program Enter the type of loan program tracked by the aggregate area.

Loan Interest Attribute Enter whether the loan servicer pays the interest on the loan.

Subsidized: The loan servicer pays the interest on the loan while the student is in school, during the repayment grace period, and during any deferment periods.

Unsubsidized: The loan servicer does not pay the interest on the loan.

Loan Fees

Enter the loan fees that you want to associate with the loan financial aid item type, including Direct Loan interest rebate fees. You must set up loan fees on the Loan Fee Table page before assigning loan fees to a financial aid item type. The Packaging process uses the loan fees that you assign to calculate the loan fee amount (based on the awarded amount) and to determine from which disbursements to subtract the loan fee amount. Anticipated aid and anticipated disbursements display the net amount of the award—the total award amount less the loan fee amount, plus a Direct Loan interest rebate if eligible. You can add as many loan fees as needed to reflect all of the loan fee types that apply to this financial aid item type. When you enter a loan fee, the system populates the Loan Fee Type, Loan Fee Rule, Loan Fee Option, Fee Percent, and Flat Fee fields with the corresponding values set up on the Loan Fee Table page.

Note. To properly calculate the net financial aid amount that appears on a student's billing statement, you must attach the appropriate loan fees to the financial aid item type.

See [Chapter 5, "Setting Up Packaging Basics," Setting Up Loan Fees, page 110.](#)

Calculating Actual Loan Fees for CommonLine Loans

For some loan financial aid item types, the estimated loan fees determined during the Packaging process may not reflect the actual fees charged by the loan servicers. Loans processed using the CommonLine loan business process can have the loan fees in the student's package automatically updated with the actual loan fee amounts determined by the loan servicer. The estimated loan fees are automatically updated when the loan is guaranteed by the loan servicer and a CommonLine application response record is processed for the student. If you adjust the student's loan award after the loan fees are updated, the Packaging process uses the actual loan fee rate used by the loan servicer (instead of the loan fees assigned to the financial aid item type) to calculate loan fees for the new award amount.

See [Chapter 36, "Processing CommonLine Loans," Reviewing CL 4 Status and Phase Codes, page 1336.](#)

Calculating Direct Loan Interest Rebate

You must insert the Direct Loan rebate loan fee you set up on the Loan Fee Table page on the FA Item Type 6 page for all Direct Loan financial aid item types. The up-front interest rebate amount of 1.5 percent of the gross disbursement is calculated at the disbursement level for each Direct Subsidized, Direct Unsubsidized, and Direct PLUS loan. The interest rebate amount is added after the 3 percent loan fee is subtracted from the gross disbursement amount. For example, a student receives a Direct Loan of 1,000.00 USD for the fall 2004 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent interest rebate of 15.00 USD is added back into the loan.

The loan fee and interest rebate amounts are truncated. This means the system removes cents and uses the remaining whole dollar amount. The dollar value is not rounded up or down. When calculating the combined fee and interest rebate amount and the loan fee amount, the process carries the result out to three decimal places.

Note. Gross disbursement calculations do not change with the interest rebate implementation. Dollar figures are rounded to the nearest dollar. All disbursements are equal except in cases where a variance may be applied to the last disbursement.

The following table uses a 3,500.00 USD loan amount and is an example of determining combined fee and interest rebate amount, disbursement net amount, loan fee amount, and interest rebate amount for three disbursements:

Disbursement Amounts		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Disb #	Gross Disb Amt	Com Fee/Int Rebate Amount	Truncated Com Fee/Int Rebate Amount	Disb Net Amount	LnFee Amount	Truncated LnFee Amount	Interest Rebate Amount
1	1167 USD	$1167 \times (.03 - .015) = 17.505$	17	$1167 - 17 = 1150$	$1167 \times .03 = 35.01$	35	$1150 - (1167 - 35) = 18$
2	1167 USD	$1167 \times (.03 - .015) = 17.505$	17	$1167 - 17 = 1150$	$1167 \times .03 = 35.01$	35	$1150 - (1167 - 35) = 18$
3	1166 USD	$1166 \times (.03 - .015) = 17.49$	17	$1166 - 17 = 1149$	$1166 \times .03 = 34.98$	34	$1149 - (1166 - 34) = 17$
Totals	3500 USD			3449 USD		104 USD	53 USD

See Also

Chapter 5, "Setting Up Packaging Basics," Setting Up Loan Fees, page 110

Defining GAP Financial Aid Item Types

Use GAP financial aid item types to establish an amount of financial aid that is not met at a particular point in time by a packaging plan.

To create a GAP financial aid item type:

1. Verify that a GAP item type exists in the Item Types component (Set Up SACR, Product Related, Student Financials, Item Types).

If you need to create a GAP item type, define only the Initial Setup page. When you add the item type, you could use a series of 9s as the ID to distinguish this item type from other item types because GAP is a unique item type—not shown on award letters and not part of the student's award record. On the Initial Setup page, enter a description, short description, and any applicable keywords (based on your institution's keyword scheme). Then clear the GL Interface Required check box and select the Financial Aid option in the Classification group box.

2. Add a new financial aid item type, selecting the GAP item type in the add dialog box.

3. Complete the fields in the Financial Aid Item Types component as you do for any other financial aid item type.

Keep in mind that when you use the GAP in a packaging plan, the Packaging process treats the GAP financial aid item type as it does any other financial aid item type, honoring the values and rules that you establish in the Financial Aid Item Types component and the percentage of the Total Need field in the packaging plan. For example, a packaging plan's FM percentage of Total Need field has a value of 50 percent, the GAP financial aid item type has a term limit of 5,000.00 USD, and you have a student with an FM need of 8,000.00 USD. The Packaging process assigns a GAP of only 4,000.00 USD to the student, because that is 50 percent of the student's FM need, even though this is less than the term limit.

4. Set your default GAP financial aid item type at the installation level on the Financial Aid Defaults page.

You can also set default GAP financial aid item types at the academic career or academic program level, using aid processing rule sets.

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13.](#)

Budgeting Fiscal Limits

To set up fiscal limits, use the Fiscal Item Types component (ITEM_TYP_FISCAL).

This section provides an overview of fiscal limits and discusses how to:

- Assign fiscal limits to financial aid item types.
- Review fiscal fund status.
- Reviewing fiscal fund notes.
- Review fiscal limits for aggregate areas.

Understanding Fiscal Limits

Use the Fiscal Item Types component to set up your financial aid item type fiscal detail. These are the fiscal amounts that you want Financial Aid to adhere to when awarding and disbursing the financial aid item type. You must set up fiscal limits for each financial aid item type—if a financial aid item type does not have fiscal limits, you cannot award it.

If you have not set up fiscal limits:

- During manual packaging you receive message 9531: "There is no entry in the ITEM_TYPE_FISCL table for the Item Type associated with this award."

Please check Set Up SACR, Product Related, Awards, Fiscal Item Types to determine whether Fiscal Limits have been defined for the Item Type being packaged. If Fiscal Limits have not been defined, please add them. If Fiscal Limits have been defined, please contact your System Administrator for assistance."

- During Auto or Mass Packaging, you receive message 9532: "There is no entry in the ITEM_TYPE_FISCL table for the Item Type associated with this Packaging Rule.

Please check Set Up SACR, Product Related, Awards, Fiscal Item Types to determine whether Fiscal Limits have been defined for the Item Type being packaged. If Fiscal Limits have not been defined, please add them. If Fiscal Limits have been defined, please contact your System Administrator for assistance."

Pages Used to Budget Fiscal Limits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Fiscal Limits	ITEM_TYPE_FISCL	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Assign Fiscal Limits	Assign fiscal limits to financial aid item types. Define the maximum amount of money that can be offered, accepted, and disbursed for a financial aid item type.
Fiscal Fund Status	ITEM_TYPE_FISCL2	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Status	Review the status of a financial aid item type's fiscal fund.
Fiscal Fund Notes	ITEM_TYPE_FISCL3	Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Notes	Enter comments regarding a fund for informational use by your financial aid staff.
Fiscal Aggregate Summary	AGGR_AREA_FISCL	Financial Aid, Fund Management, Fiscal Aggregate Summary, Fiscal Aggregate Summary	Review detailed fiscal information for an aggregate area. You cannot enter budgeted amounts for an aggregate area; the values on this page are the sum of all financial aid item types associated with this aggregate area.

Assigning Fiscal Limits to Financial Aid Item Types

Access the Assign Fiscal Limits page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Assign Fiscal Limits).

Assign Fiscal Limits		Fiscal Fund Status	Fiscal Fund Notes
SetID:	PSUNV		
Item Type:	900000000105 Federal SEOG Grant		Aid Year: 2008 Federal Aid Year 2007 - 2008
	Max to Offer	Max to Accept	Disbursements
Budgeted:	1,000,000.00	1,000,000.00	Budgeted: 1,000,000.00
Highest:	68,000.00	68,000.00	Paid: 33,333.34
Reductions:	0.00	0.00	Potential Payments: 966,666.66
Net:	68,000.00	68,000.00	
Available:	932,000.00	932,000.00	
Count:	17	17	

Assign Fiscal Limits page

Budgeted – Max to Offer	The maximum source of funding you can offer for this financial aid item type.
Budgeted – Max to Accept	The maximum source of funding that can be accepted for this financial aid item type.
Highest – Max to Offer	The sum of all the highest offer amounts from each student who received this financial aid item type award. If a student were initially offered 500.00 USD, then 500.00 USD would be added to this sum. If the student was later offered 800.00 USD, then 500.00 USD would be subtracted and 800.00 USD would be added to the sum because it is the highest amount offered to the student. This amount enables you to know what your maximum total offer amount is for this financial aid item type.
Highest – Max to Accept	The sum of all the highest accepted amounts from each student who received this item type award. This amount enables you to know what your maximum total accepted amount is for this financial aid item type.
Reductions – Max to Offer	The sum of the reduced offer amounts from each student for this financial aid item type. If a student is offered 800.00 USD for this item type and later the offer is reduced to 600.00 USD, then 200.00 USD is added to the sum. If the award is reduced again for the student, then the additional reduction amount is added to the sum.
Reductions – Max to Accept	The sum of the reduced accept amounts from each student for this financial aid item type.

Note. To calculate the gross amount, add the net amount and the reductions amount. Gross = Net + Reductions

Net – Max to Offer	The sum of the current offer amounts for this financial aid item type.
Net – Max to Accept	The sum of the current accept amounts for this financial aid item type.
Available – Max to Offer	The remaining source of funding available to award students for this financial aid item type. Equals the Budgeted – Max to Offer minus the Net – Max to Offer.
Available – Max to Accept	The remaining amount available for students to accept for this financial aid item type. Equals the Budgeted – Max to Accept minus the Net – Max to Accept.
Count – Max to Offer	The number of students (unduplicated) who have been offered an award of this financial aid item type. Does not include students that have canceled or declined awards.
Count – Max to Accept	The number of students (unduplicated) who have accepted an award of this financial aid item type. Does not include students that have canceled or declined awards.

Here is an example of how the amounts in the highest, reductions, and net columns are calculated. This example tracks only one student. On the page itself, the values shown are added to similar values for all other students who are awarded the financial aid item type.

<i>Award Activity</i>	<i>Highest</i>	<i>Reductions</i>	<i>Net</i>
Offer 1,000 USD	1,000 USD	0	1,000 USD
Reduce to 800 USD	1,000 USD	200 USD	800 USD
Increase to 1,500 USD	1,500 USD	200 USD	1,500 USD
Reduce to 500 USD	1,500 USD	1,200 USD	500 USD
Cancel award offer	1,500 USD	1,700 USD	0

Budgeted – Disbursements	The amount you want to budget for the total disbursements of this financial aid item type.
Paid – Disbursements	The amount that has been authorized and disbursed to students from this financial aid item type.
Potential Payments – Disbursements	The remaining amount available to disburse to students for this financial aid item type. Equals the Budgeted – Disbursements minus the Paid – Disbursements.

Reviewing Fiscal Fund Status

Access the Fiscal Fund Status page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Status).

Assign Fiscal Limits Fiscal Fund Status Fiscal Fund Notes				
SetID:	PSUNV			
Item Type:	900000000105 Federal SEOG Grant		Aid Year:	2008 Federal Aid Year 2007 - 2008
	Max to Offer	Max to Accept		Disbursements
Budgeted:	1,000,000.00	1,000,000.00	Budgeted:	1,000,000.00
Highest:	68,000.00	68,000.00	Paid:	33,333.34
Reductions:	0.00	0.00		
Net:	68,000.00	68,000.00	Potential Payments:	966,666.66
Available:	932,000.00	932,000.00	Cancelled Amount:	0.00
Count:	17	17	Count:	0
			Declined Amount:	0.00
			Count:	0

Fiscal Fund Status page

Give financial aid staff who need to know this information but who you do not want to have the ability to change the budgeted amount for a fiscal fund access to this page instead of the Assign Fiscal Limits page.

Cancelled Amount	Displays the sum of the awards of this financial aid item type that have been cancelled.
Cancelled Count	Displays the number of students that have cancelled awards of this financial aid item type.
Declined Amount	Displays the sum of the awards of this financial aid item type that have been declined.
Declined Count	Displays the number of students that have declined awards of this financial aid item type.

Reviewing Fiscal Fund Notes

Access the Fiscal Fund Notes page (Set Up SACR, Product Related, Financial Aid, Awards, Fiscal Item Types, Fiscal Fund Notes).

Assign Fiscal Limits		Fiscal Fund Status		Fiscal Fund Notes	
SetID:	PSUNV				
Item Type:	900000000105	Federal SEOG Grant	Aid Year:	2008	Federal Aid Year 2007 - 2008
Notes Find View All First 1 of 1 Last					
User ID:	PS		Date/Time:	10/14/08 9:06:32PM	
Comment:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>				

Fiscal Fund Notes page

Enter comments regarding a fund for informational use by your financial aid staff.

Reviewing Fiscal Limits for Aggregate Areas

Access the Fiscal Aggregate Summary page (Financial Aid, Fund Management, Fiscal Aggregate Summary, Fiscal Aggregate Summary).

Fiscal Aggregate Summary

SetID:PSUNV

Aggregate Area:STAFFORD

Stafford Loan - Subsidized

Find

View All

First

1 of 1

Last

Aid Year:2008

Federal Aid Year 2007 - 2008

	Disbursements		Max to Offer		Max to Accept
Budgeted:	\$14,999,999.00	Budgeted:	\$14,999,999.00		\$14,999,999.00
Paid:	\$32,162.00	Gross:	\$170,250.00		\$170,250.00
Potential Payments:	\$14,967,837.00	Reductions:	\$0.00		\$0.00
		Net:	\$170,250.00		\$170,250.00
		Available:	\$14,829,749.00		\$14,829,749.00
		Count:	50		50

	Authorized		Cancelled		Declined
Budgeted:	\$0.00	Amount:	\$0.00		\$0.00
Net:	\$0.00	Count:	0		0

Fiscal Aggregate Summary page

Budgeted – Authorized	The maximum source of funding that can be authorized for this aggregate area.
Net – Authorized	The sum of the current authorized amounts for this financial aid item type. When this amount equals the budgeted amount, no further awards for this aggregate area can be authorized.

Preparing for Early Financial Aid Offers

To set up early financial aid categories, use the Early Financial Aid Categories component (ERLY_FA_CTG_TBL).

This section provides an overview of early financial aid offers and discusses how to set up early financial aid offer categories.

Understanding Early Financial Aid Offers

Early financial aid offers are a recruiting tool used by admissions and financial aid departments to provide preliminary financial aid offers to prospective students. The early financial aid offer is constructed independently of financial aid rules and procedures.

You can associate an early financial aid offer with each admission application a prospective student submits. This feature is especially useful for graduate and professional schools that make financial aid offers to hot prospects and is used by financial aid and undergraduate admission offices to provide a competitive advantage in their freshman recruitment process.

Early financial aid offers are made using general financial aid categories that you define on the Early Aid Categories page. Create early financial aid offer categories for all the types of financial aid that you are using for early awarding. For example, you may want to create separate early financial aid offer categories for grants, scholarships, work-study, and loans. When creating the early financial aid offer you could specify the estimated amount to be awarded in each category. If you want to display only an estimated total award amount you can define a general category, such as Estimated Financial Aid, and use only this category in the early financial aid offer.

Page Used to Prepare for Early Financial Aid Offers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Early Aid Categories	ERLY_FA_CTG_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Early Financial Aid Categories, Early Aid Categories	Set up early financial aid offer categories. Specify the types of aid your institution considers for an early financial aid offer.

Setting Up Early Financial Aid Offer Categories

Access the Early Aid Categories page (Set Up SACR, Product Related, Financial Aid, Awards, Early Financial Aid Categories, Early Aid Categories).

Early Aid Categories

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Aid Category: LOANS

Find View All First 1 of 1 Last	
*Effective Date: 01/01/1900	*Status: Active
*Description: Financial Aid Loans	
Short Description: Loans	
Comments: All Loans, including Federal, State, University and Private.	

Early Aid Categories page

Comments Enter a more detailed description of the early financial aid offer category in this field. You can set up this description to print on your early financial aid offer letter.

Setting Up Restricted Aid

To set up restricted aid, use the Restricted Aid Table component (RESTRCTD_AID_SETUP).

This section provides an overview of restricted aid and discusses how to:

- Define restricted aid basic information.
- Define award limits and requirements.
- Attach an external organization.
- Assign a committee.

See Also

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook, "Setting Up for Evaluating Applicants"

Understanding Restricted Aid

Restricted aid includes awards such as scholarships, fellowships, and institutional or private funds with more subjective eligibility requirements. Restricted aid does not refer to federal monies. Awarding restricted aid makes use of the rating scheme and committee features of PeopleSoft Enterprise Campus Community. Use the Restricted Aid Table component to set up all of the parameters and conditions for awarding your institution's restricted funds.

Note. If you are using a review process for evaluating candidates for restricted aid, you must define a rating scheme. You must also complete the pages in the Maintaining Organization Data and Managing Committees sections of the *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook*.

Pages Used to Set Up Restricted Aid

Page Name	Definition Name	Navigation	Usage
Restricted Aid Detail 1	RSTRC_AID1	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 1	Define basic information about the restricted aid award, including whether an application is required and whether the award is renewable.
Restricted Aid Detail 2	RSTRC_AID2	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 2	Define award limits and requirements. Enter the number of awards, maximum and minimum award amounts, and application requirements.
Restricted Aid Org/Contact (restricted aid organization/contact)	RSTRC_AID3	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Org/Contact	Attach an external organization to the restricted aid type and view the contact information for that organization.
Restricted Aid Committees	RSTRC_AID5	Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Committees	Assign a committee to evaluate candidates. Review a list of individual committee members and their roles within the committee.

Defining Restricted Aid Basic Information

Access the Restricted Aid Detail 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 1).

Restricted Aid Detail 1		Restricted Aid Detail 2		Restricted Aid Org/Contact		Restricted Aid Committees	
Institution:	PSUNV	PeopleSoft University				Restricted Aid ID: REGENT	
Aid Year:	2005	Financial Aid Year 2004-2005					
Description:	<input type="text" value="Regents Scholarship"/>				Short Desc:	<input type="text"/>	
Restricted Aid Type:	<input type="text" value="Scholarship"/>				<input checked="" type="checkbox"/> Renewable		
Application Required:	<input type="text" value="Internal"/>						
Application Deadline:	<input type="text" value="31"/>						
Application Submit Location:	<input type="text" value="Fin-Aid Office"/>						
Duration:	<input type="text" value="4"/>		<input type="text" value="Years"/>				
Development Code:	<input type="text" value="RS1"/>						

Restricted Aid Detail 1 page

Restricted Aid Type	Identify the restricted aid as a fellowship or scholarship.
Renewable	Select if the restricted aid is a renewable aid source.
Application Required	Select whether an application is required, and if so, what kind of application. You can select <i>External</i> , <i>Internal</i> , or <i>No App</i> (no application).
Application Deadline and Application Submit Location	If an application is required, enter the date it must be turned in and where to submit it.
Duration	Enter a numeric value for the duration of the restricted aid type and then indicate in the adjacent field whether this is <i>Days</i> , <i>Months</i> , <i>Terms</i> , or <i>Years</i> .
Development Code	Enter a code of up to four alphanumeric characters. The development code is institution-specific and assists with institutional reporting needs.

Defining Award Limits and Requirements

Access the Restricted Aid Detail 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Detail 2).

Restricted Aid Detail 1		Restricted Aid Detail 2		Restricted Aid Org/Contact		Restricted Aid Committees	
Institution:	PSUNV	PeopleSoft University		Restricted Aid ID:		REGENT	
Aid Year:	2005	Financial Aid Year 2004-2005					
Number Of Awards:	<input type="text" value="200"/>	<input type="checkbox"/>	Bill Donor	Total Funding:	<input type="text" value="5,000,000.00000"/>		
Min Amt:	<input type="text" value="1,000.00000"/>			SetID:	<input type="text" value="PSUNV"/>	PSU	
Max Amt:	<input type="text" value="10,000.00000"/>			Item Type:	<input type="text" value="90000000000"/>	Frank Lee	
Application Requirements:	<input type="text" value="UGALL"/>	Undergrad Appl Req - All					
Report Requirements:	<input type="text" value="RSTREQ"/>	Restricted Aid Requirements					
Recipient Requirements:	<input type="text"/>						
Rating Scheme:	<input type="text" value="UGINTERVW"/>	Undergraduate Interviews					
Comment:	<input type="text"/>						

Restricted Aid Detail 2 page

Number of Awards	Enter the number of awards that you can make from this restricted aid type.
Bill Donor	Select if you bill the donor when the aid is awarded.
Total Funding	Enter the total funding amount for this restricted aid type.
Min Amt (minimum amount) and Max Amt (maximum amount)	Enter the minimum and maximum amounts that you can award for this restricted aid type.
Item Type	Enter the financial aid item type associated with this restricted aid type.
Application Requirements	Select the checklist that applicants must finish to apply for this restricted aid type.
Report Requirements	Select the checklist that contains the reporting requirements a staff member fulfills for this restricted aid type.
Recipient Requirements	Select the checklist that contains the tasks award recipients must fulfill.
Rating Scheme	Select the rating scheme that outlines the selection process. Rating schemes are set up in Recruiting and Admissions.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Checklists"

Attaching an External Organization

Access the Restricted Aid Org/Contact page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Org/Contact).

Restricted Aid Org/Contact page

External Org ID (external organization ID) Select the organization ID that represents the organization associated with this restricted aid type. To view any additional organizations associated with this restricted aid type, use the scroll arrows.

Comment Displays an explanation of the selected organization. Enter any additional information about the organization into this field.

Contact Name Displays a contact person at the organization. To view additional contacts, use the scroll arrows.

Contact Nbr (contact number) Indicates that more than one contact person exists, or differentiates between different contact information for the same contact person.

Phone Displays the contact person's phone number.

Assigning a Committee

Access the Restricted Aid Committees page (Set Up SACR, Product Related, Financial Aid, Awards, Restricted Aid Table, Restricted Aid Committees).

Restricted Aid Detail 1		Restricted Aid Detail 2		Restricted Aid Org/Contact		Restricted Aid Committees	
Institution:	PSUNV	PeopleSoft University		Restricted Aid ID:		REGENT	
Aid Year:	2005	Financial Aid Year 2004-2005					
<div>Find View All First 1 of 1 Last</div>							
*Committee:	ALUMNI		Alumni Committee				
Committee Type:	Alumni Scholarship Committee						
Comment:							
<div>Find View All First 1-2 of 2 Last</div>							
Evaluator ID:	AD1005	Perkins,Tyler	Committee Role:	CHAI	Chair		
	AD1004	Risk,Mark		MMBR	Member		

Restricted Aid Committees page

Committee	Enter the committee that evaluates the candidates.
Committee Type	Indicates the type of committee.
Comment	Enter additional information about the committee in this field.
Evaluator ID	Enter the ID of a committee member.
Committee Role	Enter the individual's role within the committee.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Committee Templates"

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Committee Data"

Setting Up Award Adjustment Reasons

To set up award adjustment reasons, use the Award Adjustment Reasons component (AWRD_ADJ_RSN_TBL).

Award adjustment reasons are institutionally defined reasons indicating why an award may be adjusted. Award adjustment reasons can be used for clarification when modifying an award and also for statistical tracking purposes. You can enter an award adjustment reason any time that you change an award on the award entry pages, but award adjustment reasons are required on the Professional Judgement page. Some sample award adjustment reasons come pre-delivered with Financial Aid, but you can modify, add, and delete these.

This section discusses how to create award adjustment reasons.

Pages Used to Set Up Award Adjustment Reasons

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Award Adjustment Reasons	AWRD_ADJ_RSN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Award Adjustment Reasons, Award Adjustment Reasons	Create or modify award adjustment reasons.
Copy Adjustment Reasons	AWD_ADJ_RSN_COPY	Click the Copy button on the Award Adjustment Reasons page.	Copy award adjustment reasons from one aid year and institution combination to another.

Creating Award Adjustment Reasons

Access the Award Adjustment Reasons page (Set Up SACR, Product Related, Financial Aid, Awards, Award Adjustment Reasons, Award Adjustment Reasons).

Award Adjustment Reasons

Institution:	PSUNV	PeopleSoft University	Copy
Aid Year:	2008	Financial Aid Year 2007 - 2008	

Find | View All

First 1-3 of 7 Last

*Code:	AP1	Description:	Appeal to Director	+ -
		Long Description:	Appeal to Director	

*Code:	COA	Description:	Cost of Attendance Adjustment	+ -
		Long Description:	Cost of Attendance adjustment	

*Code:	EQK	Description:	Earthquake Damage	+ -
		Long Description:	Adjustments to Tax Forms based on Earthquake Damage, Natural Disaster	

Award Adjustment Reasons page

Code	Enter a three-character code that represents the award adjustment reason.

Chapter 6

Setting Up ACG and SMART Grants

The Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (SMART) awards affect several setup steps and processes. ACG and SMART functionality is available for all phases: Financial Aid Term, Eligibility, Packaging, Disbursement, and COD Reporting.

This chapter provides an overview of ACG and SMART grants and discusses how to:

- Set up eligibility requirements for ACG and SMART grants.
- Set up Financial Aid Term for HERA academic level calculations.
- Set up Packaging and Repackaging processes.
- Set up disbursement rules for ACG and SMART grants.
- Write and use equations for ACG and SMART eligibility.

See Also

[Chapter 3, "Setting Up Financial Aid Terms," page 47](#)

[Chapter 5, "Setting Up Packaging Basics," page 75](#)

[Chapter 15, "Setting Up Disbursement Rules," page 441](#)

[Chapter 25, "Assessing Eligibility for Financial Aid," page 779](#)

[Chapter 27, "Preparing for Awarding and Packaging," page 931](#)

[Chapter 28, "Awarding and Packaging Students," page 983](#)

[Chapter 46, "Using Common Origination and Disbursement," page 1747](#)

Setting Up Eligibility Requirements for ACG and SMART Grants

This section discusses how to:

- Select evaluation and awarding options for ACG and SMART grants.
- Set up Financial Aid process equation groups.
- Select ACG and SMART reporting options.
- Maintain Classification of Instructional Programs (CIP) codes for SMART.

- Maintain ACG state program codes.
- Set up COD edit codes.
- Create academic level rules to calculate HERA levels.

Pages Used to Set Up Eligibility Requirements for ACG and SMART Grants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ACG/SMART Processing Options	SFA_ASG_PARMS	Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG/SMART Processing Options	Set up the evaluation and awarding options for ACG and SMART grants.
Equation Group Setup	SFA_EQ_GROUP_SETUP	Setup SACR, Product Related, Financial Aid, ACG/SMART Grants, Equation Group Setup	Set up and maintain equation groups to be used by Financial Aid processes.
ACG/SMART Reporting Options	SFA_ASG_SETUP	Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG/SMART Reporting Options	Set up ACG/SMART reporting options.
Eligible CIP Codes for SMART	SFA_ASG_CIP_CODE	Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, Eligible CIP Codes for SMART	Set up and maintain eligible CIP codes for SMART grants. Data is stored by aid year.
ACG State Program Codes	SFA_ASG_HS_PROGRAM	Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG State Program Codes	Maintain list of eligible state high school program codes for ACG. Data is stored by aid year.
COD Edit Codes	SFA_COD_EDIT_CODE	Setup SACR, Product Related, Financial Aid, File Management, COD Edit Codes	Maintain list of valid COD edit codes used by the grant components.
Academic Level Table	ACAD_LEVEL_TBL	Setup SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Level Table	Set up several student level calculations such as Academic Level, NSLDS Loan Year, and Direct Lending Year.

Selecting Evaluation and Awarding Options for ACG and SMART Grants

Access the ACG/SMART Processing Options page (Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG/SMART Processing Options).

ACG/SMART Processing Options

Institution: PSUNV PeopleSoft University

Aid Year: 2008

*Grant Participant: ACG and SMART

*Awarding Option: Eligible, pending review

Academic Level Equation Option:

CIP Code Source: Academic Plan

CIP Code Equation: FAASSCIPFATM

ACG/SMART Processing Options page

Grant Participant

Select the grant programs for which the grant evaluation process should process students who have the qualifying HERA academic level. Values are:

ACG and SMART: Select and evaluate students for both ACG and SMART grants.

ACG Only: Select and evaluate students for ACG grants.

SMART Only: Select and evaluate students for SMART grants.

Awarding Option

Select the minimum grant eligibility status required to award the ACG/SMART grant during the Packaging process. Values are:

Eligible: Only award if the eligibility status is at this level.

Eligible, pending: In addition to the eligibility status of *Eligible*, also award if the status is *Eligible, pending*.

Academic Level Equation Option

Optional. If this field is left blank, the grant processes assign the HERA level calculated in the student's FA Term record.

Select a custom equation that calculates the student's HERA academic level and assigns the value in the student's grant eligibility record.

CIP Code Source (classification of instructional program code source)

Required for SMART participants. Select from *Academic Plan*, *Academic Program*, and *Academic Subplan*.

CIP Code Equation
(classification of instructional program code equation)

Required for SMART participants. Select the equation that derives the student's CIP code.

The delivered equation FAASSCIPFATM is the default equation for most schools. It uses the CIP Code source and the student's academic program, plan, and sub-plan information stored in FA Term to determine the CIP code. It does not verify that the CIP code is SMART eligible.

Schools can also create a custom equation to determine the CIP code.

Setting Up Financial Aid Process Equation Groups

Access the Equation Group Setup page (Setup SACR, Product Related, Financial Aid, ACG/SMART Grants, Equation Group Setup).

Equation Group Setup

Institution: PSUNV PeopleSoft University

Equation Group: ACG 1 FALL

*Group Type: ACG 1

Description: ACG HERA Level 1 Fall

Customize Find First 1-3 of 3 Last					
	*Equation Name	Description	Equation Sequence		
1	FAASDCITIZEN	ACG/SMART Citizenship	1	+	-
2	FAASSFTLOAD	ACG/SMART Full Time Load Verif	3	+	-
3	FAASSPELLELG	ACG/SMART Pell Eligibility	2	+	-

Equation Group Setup page

Use the Equation Group Setup page to assign the equations to be used to evaluate a student's grant eligibility. Do not create equation groups until you have determined how and when to incorporate the use of equations in your business processes.

You can create multiple equation groups based on your grant evaluation business process. Equation groups primarily determine whether students are eligible to receive ACG or SMART grants, but can also be designed to verify that students continue to maintain their eligibility.

Equation Group

Select your name for the equation group. If in Add mode, enter the name in free-form text.

Group Type	<p>Required. Select the specific grant that is evaluated for this Equation Group. Values are:</p> <p><i>ACG 1:</i> ACG evaluation for students with HERA level 0 or 1.</p> <p><i>ACG 2:</i> ACG evaluation for students with HERA level 2.</p> <p><i>SMART 1:</i> SMART evaluation for students with HERA level 3.</p> <p><i>SMART 2:</i> SMART evaluation for students with HERA level 4.</p> <p><i>SMART 3:</i> SMART evaluation for students with HERA level 5.</p>
Description	Displays the user-defined description of the equation group.
Equation Name	<p>Select the equation to be added to the group. Use the delivered equations, or those designed by your institution.</p> <p>The available equations that can be selected are filtered based on the grant for which the equation has been created.</p>
Equation Sequence	Assign a sequence number to determine the order of execution of each equation in a group. This is important if you require a value determined by an earlier equation to be used by a later equation in the group.

For more information about equations and equation groups,

See Chapter 6, "Setting Up ACG and SMART Grants," Using Delivered Equations for HERA Eligibility Evaluation, page 190.

Selecting ACG and SMART Reporting Options

Access the ACG/SMART Reporting Options page (Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG/SMART Reporting Option).

ACG/SMART Reporting Options

Institution: PSUNV PeopleSoft University

Aid Year: 2008

Setup Options			Find View All	First	1 of 1	Last
*Reporting School Code:	001315	PeopleSoft University				
Disbursement Offset:	-7	<input type="checkbox"/> Originate Offered Awards				
		<input checked="" type="checkbox"/> Disb Prior to Transmitting				














































ACG/SMART Reporting Options page

Use this page to define grant origination processing options for ACG and SMART grants.

- Reporting School Code** Select the owning school code used for Pell.
- Disbursement Offset** Enter the number of days from the scheduled disbursement date that can be used to select disbursement records for reporting to COD. To select disbursement records prior to the scheduled date, use a negative signed number.
- Originate Offered Awards** Select this check box to include ACG and SMART awards in offered status for origination. If not selected, only grants with an accept status are originated.
- Disb Prior to Transmitting** (disbursement prior to transmitting) Select this check box to restrict the reporting of disbursement information to COD until the individual disbursement has been paid to the student's account.

Maintaining CIP Codes for SMART

Access the Eligible CIP Codes for SMART page (Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, Eligible CIP Codes for SMART).

Eligible CIP Codes for SMART				
Aid Year: 2008 Federal Aid Year 2007 - 2008				
Customize Find  First  1-311 of 311  Last				
*Code	Description	Status		
01.0901	Animal Sciences, General	Active		 
01.0902	Agricultural Animal Breeding	Active		 
01.0903	Animal Health	Active		 
01.0904	Animal Nutrition	Active		 
01.0905	Dairy Science	Active		 
01.0906	Livestock Management	Active		 
01.0907	Poultry Science	Active		 
01.0999	Animal Sciences, Other	Active		 
01.1001	Food Science	Active		 
01.1002	Food Technology and Processing	Active		 
01.1101	Plant Sciences, General	Active		 
01.1102	Agronomy and Crop Science	Active		 
01.1103	Horticultural Science	Active		 
01.1104	Agricultural and Horticultural Plant Breeding	Active		 

Eligible CIP Codes for SMART page

The page displays all SMART grant eligible Classification of Instructional Program (CIP) codes. The codes are set up and populated by aid year.

Oracle monitors changes to the list of eligible CIP codes and delivers them where necessary. You can also enter changes to the eligible CIP codes.

You can use the Aid Year Rollover process (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup) to copy the codes from one aid year to another.

Code	Displays the CIP code.
Description	Displays the program description of the CIP code.
Status	<p>Indicates whether the CIP code is eligible to make new awards for the aid year. Values are:</p> <p><i>Active:</i> Indicates that the program is eligible for a first time SMART recipient for the aid year.</p> <p><i>Inactive:</i> Indicates that the program is not eligible for first time awards for the aid year, but may be used to award a renewal SMART grant for eligible students who were awarded in a previous aid year.</p>

Maintaining ACG State Program Codes

Access the ACG State Program Codes page (Set Up SACR, Product Related, Financial Aid, ACG/SMART Grants, ACG State Program Codes).

ACG State Program Codes		
Aid Year: 2007 Financial Aid Year 2006 - 2007		
*Code	Description	
AL0001	Alabama Advanced Academic Endorsement	+ -
AL0002	High Schools That Work Award of Educational Achievement	+ -
AR0001	Arkansas Academic Challenge Core Curriculum	+ -
AR0002	Arkansas Coursework Option	+ -
AR6001	Arkansas State Scholars Initiative	+ -
AZ0001	Arizona Dual Credit Coursework Program	+ -
AZ6001	Arizona State Scholars Initiative	+ -
CA0001	California Golden State Seal Merit Diploma	+ -
CA0002	California A-G Requirements	+ -
CO0001	Colorado Higher Education Admission Requirements (HEAR)	+ -
CO6001	Colorado State Scholars Initiative	+ -
CT0001	Connecticut Technical High School System Program	+ -
CT0002	Connecticut Dual Enrollment Program	+ -
CT6001	Connecticut State Scholars Initiative	+ -
DD0001	Department of Defense Education Activity (DoDEA) Requirement	+ -
DE0001	Delaware Distinguished Achievement Diploma	+ -

ACG State Program Codes page

Use this page to view, add, or delete ACG state program codes. The page displays all ACG grant eligible state high school program codes. The codes are set up and populated by aid year. Oracle provides this information for each new aid year. You can use the Aid Year Rollover process (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup) to copy the codes from one aid year to another.

Setting Up COD Edit Codes

Access the COD Edit Codes page (Setup SACR, Product Related, Financial Aid, File Management, COD Edit Codes).

COD Edit Codes			
Aid Year: 2008 Federal Aid Year 2007 - 2008			
<div>Customize Find </div> <div>First  1-130 of 130  Last</div>			
*Code	Description		
001	Invalid Destination Mailbox ID		
002	Reporting Entity ID is not eligible to report		
003	Duplicate Document ID		
004	Entity ID (Source) not found on participant file		
005	Schools cannot submit legacy records for this program and award year		
006	Document create date greater than current system date		
007	No detail records in document		
008	Reported number of students does not equal detail count		
011	No eligible SSN, DOB, and Last Name combination match on CPS for student		
012	No eligible SSN, DOB, and Last Name combination match found on CPS for student (Last Name Match is on first 2		
013	Citizenship Status Indicator for PLUS Borrower is not eligible.		
014	Citizenship Status is not eligible for this award		
015	Corrected Value same as Original Value		
016	PLUS Borrower and Student Cannot be the Same Person if the Award Year is prior to 2005-2006 AND the Student		
017	PLUS Endorser and Student Cannot be the Same Person.		
020	First Name and Last Name blank		
021	Address is incomplete		
023	Incorrect Low Tuition and Fees code/correction applied		
024	Reported CPS transaction number does not match CPS		
025	Duplicate match on CPS		

COD Edit Codes page

This page displays all COD edit messages for the specified aid year. These codes and descriptions display in the ACG/SMART origination pages. Use this page to set up and maintain the list of valid COD edit codes used by the grant components.

Oracle delivers COD edit codes every year.

Creating Academic Level Rules to Calculate HERA Levels

Access the Academic Level Table page (Setup SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Level Table).

Level/Load Rules Table | **Academic Level Table** | Level Dependent Load Rules | Academic Load Table

SetID: PSUNV
Academic Level Rule: HE01 HERA Level 24

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Find First 1-5 of 5 Last

Cum Units/Terms	*Academic Level	*NSLDS Loan Year	*Direct Lending Year
0.000	Post-Bacc Undergraduate	1st Yr Prv	1st Yr,nvr
24.000	Post-Bacc Undergraduate	2nd Year	1st Yr,nvr
48.000	Post-Bacc Undergraduate	3rd Year	1st Yr,nvr
72.000	Post-Bacc Undergraduate	4th Year	1st Yr,nvr
100.000	Post-Bacc Undergraduate	5th Year+	1st Yr,nvr

Academic Level Table page

Use the Level/Load Rules Table component to define several student level calculations such as Academic Level, NSLDS Loan Year, and Direct Lending Year. For HERA level calculation, the FA term process uses the NSLDS Loan Year settings to determine the student level to assign based on the student's completed units. This is because the NSLDS loan year values match the student level values that are reported to COD. The student's overall HERA academic level is based on this value and, depending on the term, the Weeks of Instruction (WI) method and the corresponding WI level.

The values in the CUM Units/Terms column and the NSLDS Loan Year column define how the student's HERA level is calculated. For the values in the page shown, a student's HERA level is as shown in the following table.

<i>If the student's cumulative completed units are:</i>	<i>This HERA level is assigned:</i>
0 to 23	1st year, previously attended
24 to 47	2nd year
48 to 71	3rd Year
72 to 99	4th Year
More than 99	5th Year

Note. The Academic Level and Direct Lending Year columns on the Academic Level Table page are ignored by the HERA level calculation.

If your school participates in the SMART grant program, define your grade level progressions from 1st year through 5th year.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Level and Load Rules

Chapter 19, "Managing Financial Aid Terms," page 505

Setting Up Financial Aid Term for HERA Academic Level Calculations

Two methods exist for calculating a student's HERA academic level. The method that you use is determined by the aid year for which you are assessing a student's eligibility for an ACG or SMART grant.

For aid years 2008 and 2010 onwards, you must monitor students' academic progress using grade levels determined by total completed units and the load level rule assigned in the HERA Academic Level Rule Setup page.

This method is called the HERA Level/Load Rule method in PeopleBooks.

For aid year 2009, you must monitor students' academic progress based on the school's federal academic year (completed units and weeks of instructions).

This method is called the Federal Academic Year method in PeopleBooks.

Note. You may see unexpected HERA academic level calculations as a result of the calculation methods changing from one aid year to the next. The Financial Aid Term process continues to determine HERA academic levels using the appropriate calculation method for the term's aid year.

This section includes an overview of HERA academic level calculations with examples and discusses how to:

- Define the HERA academic level calculation rules.
- Copy setup data from year to year.
- Define parameters for Weeks of Instruction calculations.

Understanding HERA Academic Level Calculations

This overview contains discussions about:

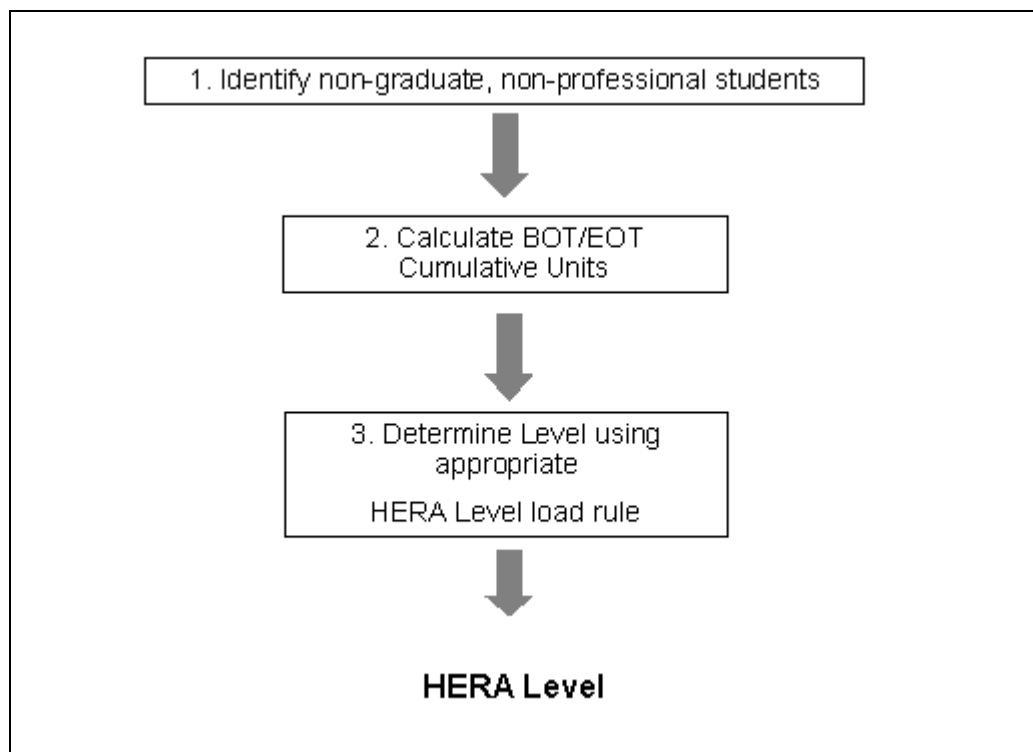
- Describing the HERA Level/Load Rule method.
- Describing the Federal Academic Year method.
- Steps for calculating HERA academic levels using the Federal Academic Year method.

Describing the HERA Level/Load Rule Method

The HERA Level/Load Rule method is based on the total number of units completed towards the student's degree.

Note. Remember that you must use the HERA Level/Load Rule method for the 2010 aid year onwards.

The following graphic shows the steps for the HERA Level/Load Rule method.



HERA Level/Load Rule method for calculating HERA academic levels

Describing the Federal Academic Year Method

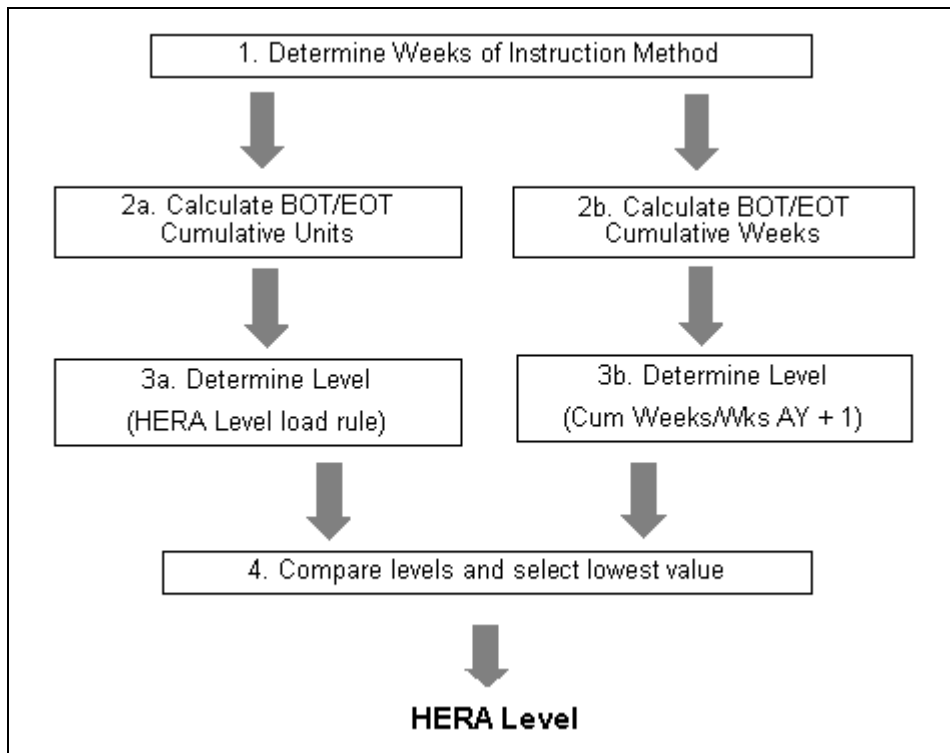
To calculate a student's HERA academic level using the Federal Academic Year method, the two components of the institution's federal academic year are measured:

- Total number of completed units.
- Number of completed weeks of instruction (WI).

Both components are then used to determine the student's level. The level is based on each component meeting a specific threshold.

Note. Remember that you must use the Federal Academic Year method for the 2009 aid year only.

The following graphics shows the steps for the Federal Academic Year method:



Federal Academic Year method for calculating HERA academic levels

In the following two examples for calculating HERA academic level and monitoring progression, the term-based institution has a 30-week academic year of 24 units. The fall and spring terms are 15 weeks and the summer term is 10 weeks. Term Units Enrolled and Term Weeks of Instruction are cumulative at the end of the term.

In the first example, the student enrolls for 12 units each term:

<i>Term</i>	<i>Term Units Enrolled</i>	<i>Term Weeks of Instruction (WI)</i>	<i>Beginning of Term Level</i>	<i>End of Term Level</i>
Fall 2007	12 (12)	15 (15)	1	1
Spring 2008	12 (24)	15 (30)	1	2
Fall 2008	12 (36)	15 (45)	2	2
Spring 2009	12 (48)	15 (60)	2	2

By the end of the spring 2008 term, the student reaches the second year level by meeting the level thresholds for both the units and weeks of instruction. By the end of the spring 2009 term, the student reaches the third year level.

In the second example, the student begins enrollment in the spring 2008 term:

Term	Term Units Enrolled	Term Weeks of Instruction (WI)	Beginning of Term Level	End of Term Level
Spring 2008	12 (12)	15 (15)	1	1
Summer 2008	12 (24)	10 (25)	1	1
Fall 2008	12 (36)	15 (40)	1	2
Spring 2009	12 (48)	15 (55)	2	2

By the end of the student's summer 2008 term, the unit threshold for a second year student is met, but not the WI threshold. The student remains at the first year level at the end of the term. By the end of the fall 2008 term, the student completes enough WI to advance to a second year level.

Steps for Calculating HERA Academic Levels Using the Federal Academic Year Method

For all aid years and academic level methods, HERA academic levels are calculated for only non-graduate, non-professional students based on the NSLDS year.

To calculate HERA academic levels using the Federal Academic Year method:

1. Determine the method for Weeks of Instruction.
- 2a. Calculate Beginning of Term and End of Term Cumulative Units.
- 2b. Calculate Beginning of Term and End of Term Cumulative Weeks.
- 3a. Determine level from Cumulative Units.
- 3b. Determine level from Cumulative Weeks.
4. Compare levels to determine HERA academic level.

Note. Remember that the Federal Academic Year method is currently used for aid year 2009 only.

Here is more detailed information about each step:

1. Determine the Method for Calculating Weeks of Instruction

Refer to the final regulations to determine which of the four methods are available to your institution. Then select the method to use for calculating weeks of instruction or ignoring weeks of instruction. The four methods are:

Exact Accounting

This method derives WI from the scheduled dates of the enrolled classes in the term. The current method for calculating WI for budgets and Pell awarding is used.

Terms Attended

This method assumes that every term has the same WI value, including nonstandard terms. WI equals the number of weeks in a school's academic year divided by the number of payment terms.

Credits Earned

This method derives a WI value by converting the enrolled units for a term to a WI value. The ED formula is:

$$(\# \text{ units in term} \times \# \text{ weeks in academic year}) / (\# \text{ of units in academic year})$$

For example, if a student enrolls in 12 units for a term and the school has a 24 unit, 30 week academic year, the term weeks would be $(12 \times 30)/24 = 15$ weeks of instruction.

Grade Level

This method does not calculate weeks of instruction. The student's HERA academic level is calculated based on the number of acceptable units completed by the student.

This is calculated by taking the total number of completed units (including transfer units) and then subtracting unacceptable work, such as Advanced Placement, International Baccalaureate, testing out, life experience, work experience, remedial, and units earned while not in an eligible program. Use the remaining units to derive the HERA academic level using the HERA academic level rules.

The Grade Level method is based on the assumption that if a student is completing enough units to advance a grade level according to the school's requirements, then the weeks of instruction requirement is being satisfied.

2a. Calculate Beginning of Term and End of Term Cumulative Units

Calculating cumulative units is similar for both the HERA Level/Load Rule and Federal Academic Year methods. The following table explains how cumulative units are calculated for the three methods that use weeks of instruction and the Grade Level method is explained after the table.

Cumulative Units	Projected Term	Enrolled, Term Not Started	Enrolled, Term in Progress	Term Completed
Beginning of Term	All completed units less the current term plus Transfer, Test credit, and other units, less adjustments. Excess FA Units assigned to remedial type courses are not included.	Same	Same	Same
End of Term	Same units calculated for Beginning of Term plus projected units for the current term.	Same units calculated for Beginning of Term plus enrolled units for the current term.	Same units calculated for Beginning of Term plus anticipated, in progress, and competed units.	Same units calculated for Beginning of Term plus completed units for the current term.

The Grade Level method follows the same rules as the other three methods except that it does not allow certain transfer work to be included in the cumulative units. The transfer units not allowed are the same as those not allowed in calculating weeks of instruction for the other methods, which includes:

- Advanced Placement
- International Baccalaureate
- Testing out
- Life experience
- Work experience
- Units earned while not enrolled in an eligible program.

This transfer work is identified in the transfer credit evaluation module during the review for inclusion in the Financial Aid Weeks of Instruction statistics. The HERA Academic Level page (Financial Aid, Financial Aid Term, Maintain Student Financial Aid Term, Acad Level, click the View HERA Academic Level link) displays the beginning of term and end of term cumulative units.

2b. Calculate Beginning of Term and End of Term Cumulative Weeks

To calculate the cumulative weeks of instruction (WI), the FA Term module first calculates WI for each term the student was enrolled (and expected to enroll for projected terms). If a student has transfer work, a separate WI might also be calculated for those transfer units. Note that WI must be calculated for terms prior to the 2009 aid year.

The Term Weeks field on the HERA Academic Level page documents the weeks of instruction per term. Term weeks is usually recalculated when a student's enrollment for a term changes. There are also conditions where the term weeks resets to zero if the student does not enroll or fails to complete any courses. As shown in the following table, calculation of Term Weeks varies depending on when FA Term is run.

Calculation Method	When	How Term Weeks Value Is Calculated
Exact Accounting	Pre-enrollment	Assigns the number of weeks of the default session that is set up for the term.
	During Enrollment	Recalculated based on the schedule of each enrolled course.
	End of Term	Term Weeks are reset to zero under these conditions: <ul style="list-style-type: none"> • Term Source becomes No Data. • Student withdraws from term. (Uses same criteria that FA Term driver uses to identify withdrawn students.) Transfer weeks are unaffected by these conditions.
Terms Attended	Pre-enrollment	Defaults to the calculated value of the number of weeks in the academic year divided by the number of payment periods in the academic year.

Calculation Method	When	How Term Weeks Value Is Calculated
	During Enrollment	Does not change.
	End of Term	<p>Term Weeks are reset to zero under these conditions:</p> <ul style="list-style-type: none"> • Term Source becomes No Data. • Student withdraws from term. (Uses same criteria that FA Term driver uses to identify withdrawn students.) <p>Transfer weeks are unaffected by these conditions.</p>
Credits Earned	Pre-enrollment	Based on the projected enrolled units FA term uses to determine load.
	During Enrollment	Adjusts based on changes to the number of enrolled units.
	End of Term	<p>Term Weeks are reset to zero under these conditions:</p> <ul style="list-style-type: none"> • Term Source becomes No Data. • Student withdraws from term. (Uses same criteria that FA Term driver uses to identify withdrawn students.) • The Fully Graded date of the term has passed, but the enrolled classes yield no earned units. • The Fully Graded date of the term has passed, but all completed classes yield failed grades. <p>Transfer weeks are unaffected by these conditions.</p>
Grade Level	Pre-enrollment	Not Applicable
	During Enrollment	Not Applicable
	End of Term	Not Applicable

To calculate Transfer Weeks of Instruction, use the formula:

$(\# \text{ total adjusted transfer units} \times \# \text{ weeks in academic year}) / \# \text{ of units in academic year}$

where *# total adjusted transfer units* is the number of transfer units accepted by the school less any unacceptable transfer work, such as Advanced Placement, International Baccalaureate, testing out, life experience, work experience, remedial, and units earned while not in an eligible program. FA Term automatically calculates transfer weeks of instruction and stores the value in the Transfer Weeks field.

For example, if a student transfers in 15 units (12 regular, 3 AP units) to a 24 unit, 30 week school, the transfer weeks would be $(12 \times 30) / 24 = 5$ transfer weeks.

Note. Transfer Weeks of Instruction calculation is not required when using the Grade Level method.

For information on reviewing and updating transfer credit information,

See [Chapter 39, "Processing ACG and SMART Grants," Reviewing Transfer Work for FA Term HERA Level Determination, page 1563.](#)

To calculate Cumulative Weeks of Instruction, add the Term Weeks and Transfer Weeks values from all prior FA Term rows:

BOT Cumulative Weeks of Instruction All previous terms Term WI and Transfer WI values where the term end date has passed and at least 1 credit earned plus Current Term Transfer WI.

EOT Cumulative Weeks of Instruction BOT Cumulative Weeks of Instruction plus Current Term Weeks of Instruction.

3a. Determine Level from Cumulative Units

Determine the level from cumulative units by applying the academic level rule found in the HERA Level Rule Set Up page (Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Academic Level Set Up).

Here is an example of a HERA level rule a school might create:

Level 1	10–23 completed units
Level 2	24–47 completed units
Level 3	48–71 completed units
Level 4	72–120 completed units

A student with 50 cumulative units would have a calculated level of 3.

3b. Determine Level from Cumulative Weeks

To determine the level from cumulative weeks, use this formula:

$(\text{Cumulative Weeks of Instruction} / \text{\# of weeks in academic year}) + 1$

The number of weeks in the academic year is taken from the value in the Hours/Credit in Acad Year field on the HERA Weeks of Instruction Set Up page (Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Weeks of Instruction) based on the student's career, academic program, or academic plan. There is no rounding of fractional data.

For example, if the cumulative number of weeks is 45 and the number of weeks in the academic year is 30 weeks, the level would be $(45 \text{ weeks} / 30 \text{ weeks}) + 1 = 2.5$ (second year).

4. Compare Levels to Determine HERA Academic Level

To determine the HERA academic level, compare the levels derived from cumulative units and cumulative weeks and assign the lower value. In the previous examples, if the level from units is 3 and the level from weeks is 2, then the HERA academic level assigned is 2 (second year).

Note that the Grade Level method does not calculate a level from WI. Instead, the level calculated from units is assigned as the HERA level from the Cumulative Units calculation.

Pages Used to Set Up Financial Aid Term for HERA Academic Level Calculations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
HERA Academic Level Rule Set Up	SFA_ASG_AL_TBL	Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Academic Level Set Up	Set up and maintain HERA academic level rules, which are used by FA Term to calculate the credit portion of the undergraduate student's academic level.
Copy HERA Academic Level Set Up	SFA_ASG_AL_COPY	Click the Copy button on the HERA Academic Level Rule Set Up page.	Copy HERA academic level parameters from one aid year to another.
HERA Weeks of Instruction Set Up	SFA_ASG_WI_TBL	Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Weeks of Instruction Set Up	Select parameters used to calculate a weeks of instruction value for non-graduate, non-professional level students.

Defining the HERA Academic Level Calculation Rules

Access the HERA Academic Level Rule Set Up page (Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Academic Level Set Up).

HERA Academic Level Rule Set Up

Academic Institution: PSUNV PeopleSoft University Copy

Aid Year: 2008 Financial Aid Year 2007 - 2008

Career/Program/Plan Set Up Customize | Find First 1-4 of 4 Last

	Career	Program	Plan	*Academic Level Rule		
1			ART	HE02	+	-
2		FAU		HE01	+	-
3		LAU		HE02	+	-
4	UGRD			UGRD	+	-

HERA Academic Level Rule Setup page

Use this page to assign HERA-level-specific academic level load rules for calculating the student's levels and to set the default level load rule for your undergraduate academic careers. Under the Federal Academic Year method, these settings are used to calculate the credit portion of the student's academic level.



The setup structure is aid-year specific to allow flexibility in assigning different Academic Level rules if the rules change from year to year. The Financial Aid Term process calculates HERA academic student level values to be used to evaluate, award, and disburse ACG and SMART grants.

For academic programs or academic plans that require a separate academic level rule, define those programs and plans. The FA Term build process determines the academic level rule to use based on finding a matching row with the student's information in the following order: Plan, Program, Career.

- Copy** Use this button to copy setup data from one aid year to another. You can also use the Aid Year Rollover process (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Year Setup) to copy this setup information.
- Career** Select each undergraduate academic career that could qualify for ACG or SMART grants.
- Program** Enter only those academic programs that require a different academic level rule to calculate their HERA academic level different from the rule defined for the student's academic career.
- Plan** Enter only those academic plans that require a different academic level rule to calculate their HERA academic level different from the rule defined for the student's academic career or academic program.
- Academic Level Rule** Select the academic level load rule to calculate the student's HERA student level progression.
The academic level rules are created in the Level/Load Rules Table page.

Copying Setup Data from Year to Year

Access the Copy HERA Academic Level Set Up page (click the Copy button on the HERA Academic Level Rule Set Up page.)

Copy HERA Academic Level Set Up	
Copy From	Copy To
Institution: PSUNV	Institution: <input type="text" value="PSUNV"/> 
Aid Year: 2008	Aid Year: <input type="text" value="2009"/> 

Copy HERA Academic Level Set Up page

Warning! Because the HERA Academic Level setup includes the aid year, you must set up data for each aid year that requires the HERA academic level to be calculated. The HERA academic level is not calculated if this setup is missing for a particular aid year.

Defining Parameters for Weeks of Instruction Calculations

Access the HERA Weeks of Instruction Set Up page (Set up SACR, Product Related, Financial Aid, ACG/SMART Grants, HERA Weeks of Instruction).

HERA Weeks of Instruction Set Up

Academic Institution: PSUNV PeopleSoft University

Default Set Up

Weeks of Instruction Method: Exact Accounting

Academic Calendar Type: Semester/Trimester, 2 payments

Hours/Credits in Acad Year: 24

Weeks in Program Acad Year: 30

Begin Weeks of Inst Calc Term: 0590 2007 Fall

End Weeks of Inst Calc Term: 0630 2009 Fall

Career/Program/Plan Set Up

Customize | Find | First 1-5 of 5 Last

	Career	Program	Plan	Weeks of Instruction Method	Academic Calendar Type	Hrs/Cred	Weeks Acad Yr		
1			BIOLBS	Grade Level Based	Semester/Trimester, 2 payments	24	30	+	-
2			CHEM-BS	Term Based	Semester/Trimester, 2 payments	24	30	+	-
3			MUSIC	Credit Based	Semester/Trimester, 2 payments	24	30	+	-
4		FAU		Grade Level Based	Semester/Trimester, 2 payments	24	30	+	-
5	UENG			Term Based	Quarter, 3 payments	36	30	+	-

HERA Weeks of Instruction Set Up page

Use this page to select and store the parameters used to calculate a weeks of instruction value. These are applied to all non-graduate, non-professional level students.

Default Setup

Weeks of Instruction Method Select the method by which weeks of instruction is calculated. Values are:

Credit Based

Exact Accounting

Grade Level Based

Term based

Academic Calendar Type Select the number of regular terms and payment periods. Values are:

Quarter, 3 payments

Quarter, 4 payments

Semester/Trimester, 2 payments

Semester/Trimester, 3 payments

Hours/Credits in Acad Year Enter the number of hours or credits that defines the academic year.
(hours or credits in the academic year)

Weeks in Program Acad Year Enter the number of weeks of instruction that defines the academic year.
(weeks in program academic year)

Begin Weeks of Inst Calc Term (begin weeks of instruction for calculating term)	Enter the first term in which the calculated weeks of instruction is used to determine the student's HERA academic level. This should be the first term of the 2009 aid year.
End Weeks of Inst Calc Term (end weeks of instruction for calculating term)	Enter the first term for the 2010 aid year for which weeks of instruction is not used in determining the HERA academic level. Starting with this term, HERA levels are calculated based on the schools academic level progression defined in the HERA Academic Level Setup component.

Note. The Grade Level method does not require a completed Hours/Credits in Acad Year field or Weeks in Program Acad Year field to perform a HERA level calculation. You must provide information however, to support the HERA level calculation when a manual override of the student's weeks of instruction method is performed.

Career/Program/Plan Set Up

Use this group box to set up specific careers, programs, or plans. Default values display when you select a career, program, or plan; you can override any of the defaults.

The Career/Program/Plan Set Up group box contains the same calculation parameters that are applied to specific academic careers, academic program, or academic plans. When FA Term calculates a student's HERA academic level, the process determines which settings to use searching first for the student's academic plan, then the academic program, then academic career. If none is found, FA Term code uses the default setting to calculate the student's weeks of instruction.

Setting Up Packaging and Repackaging Processes

To include ACG and SMART grants in your Packaging plans, you must follow instructions in the given sequence because of the dependencies associated with the various areas of setup.

This section provides an overview of Packaging rules for ACG and SMART grants and discusses how to:

- Set up item types for ACG and SMART grants.
- Add the HERA academic level to the aggregate table.
- Create aggregate aid limits.
- Map Aggregate Area Limits to NSLDS Aggregate Categories.
- Set up financial aid item types.
- Set up award rules for ACG and SMART item types.
- Set up Campus Self Service for ACG and SMART grants.
- Set up award limits for ACG and SMART item types.
- Create an ACG/SMART Repackaging plan.

Understanding Packaging Rules for ACG and SMART Grants

To include ACG/SMART grants in Packaging plans, you must:

- Set up an Item Type based on academic level for each ACG and SMART program (for example, ACG1, ACG2, SMART1, SMART2, and SMART3).
- Populate the Aggregate Level Cross Reference Table with the new HERA Academic Levels.
- Create five new Aggregate Areas to support the tracking of the ACG and SMART academic level limits (for example, ACG1, ACG2, SMART1, SMART2, and SMART3).

In Bundle 11, January 2009, the Financial Aid module was updated to accommodate fifth-year students, because the Ensuring Continued Access to Student Loans Act of 2008 (ECASLA) added a fifth-year undergraduate senior grant level for students in a five-year program of study.

The manual, auto, and mass Packaging routines as well as the Repackaging process work the same to award fifth-year students as they do to award fourth-year students.

Note. You must set up a separate aggregate area to award fifth-year undergraduates (for example, SMART3). If you try to assign U5 – fifth year aggregate level to the SMART2 aggregate area currently used for U4 – fourth year aggregate level, students do not receive their maximum SMART award eligibility as a fifth-year undergraduates.

Pages Used to Set Up Packaging and Repackaging

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Initial Setup	ITEM_TYPE_TBL	Set Up SACR, Product Related, Student Financials, Item Types, Item Types, Initial Setup	Create item types for ACG1, ACG2, SMART1, SMART2, and SMART3.
Aggregate Level Cross-Reference	AGGR_LVL_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference	Populate the new HERA Academic Level.
Aggregate Aid Limit	AGGR_AID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limit	Create multiple unique aggregate areas for each ACG and SMART grant program by academic level.
Aggregate Area-NSLDS Cross-Reference	SFA_AGGR_AREA_XREF	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Area-NSLDS Cross Reference	Map aggregate area limits to corresponding NSLDS aggregate categories.

Page Name	Definition Name	Navigation	Usage
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Populate the HERA Academic Level and ACG/SMART Aggregate Area.
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Populate Meet/Need Cost and Award Remainder Rule.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Set up Campus Self Service for ACG/SMART grants.
FA Item Type 4	ITEM_TYPE_FA_4	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4	Populate specific Term Category minimum and maximum values for ACG/SMART.
Repackaging Plan	SFA_RPKG_PLAN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Repackaging Plan	Set up rules for ACG and SMART Repackaging plans.

Setting Up Item Types for ACG and SMART Grants

You must set up five Item Types, one for each award type, ACG1, ACG2, SMART1, SMART2, and SMART3.

Access the Initial Setup page in the Student Financials application and set up the five item types.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup."

Adding the HERA Academic Level to the Aggregate Table

Access the Aggregate Level Cross-Reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Level Cross-Reference).

Aggregate Level Cross-Reference								
Aggregate Level	NSLDS Loan Year	Graduate Level	Academic Level	Description	Short Description			
G1	1st Year Graduate	<input checked="" type="checkbox"/>		Graduate 1st Year	Grad 1	+	-	
G2	2nd Year Graduate	<input checked="" type="checkbox"/>		Graduate 2nd Year	Grad 2	+	-	
G3	3rd Year Graduate	<input checked="" type="checkbox"/>		Graduate 3rd Year	Grad 3	+	-	
G4	4th or more Graduate	<input checked="" type="checkbox"/>		Graduate 4th Year	Grad 4	+	-	
P1	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-	
P2	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-	
P3	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-	
P4	Graduate/Professional	<input checked="" type="checkbox"/>		Professional Students	Profession	+	-	
U0	1st Year - Never Attended	<input type="checkbox"/>	1st Year - Never Attended	Undergraduate Freshman - Never	Fresh-nev	+	-	
U1	1st Year - Previously Attended	<input type="checkbox"/>	1st Year - Previously Attended	Undergraduate Freshman	Freshman	+	-	
U2	2nd Year	<input type="checkbox"/>	2nd Year	Undergraduate Sophomore	Sophomore	+	-	
U3	3rd Year	<input type="checkbox"/>	3rd Year	Undergraduate Junior	Junior	+	-	
U4	4th Year	<input type="checkbox"/>	4th Year	Undergraduate Senior	Senior	+	-	
U5	5th Year+	<input type="checkbox"/>	5th Year	Undergraduate Senior, 5th Year	5th Year	+	-	

Aggregate Level Cross-Reference page

Use this page to populate the Aggregate Level Cross Reference Table for the HERA Academic Level.

NSLDS Loan Year Select the year level. HERA Academic Level is only available when the NSLDS Loan Year values are one of the following:

1st Year – Never Attended

1st Year – Previously Attended

2nd Year

3rd Year

4th Year

5th Year+

Academic Level Select the corresponding HERA academic level for each aggregate level from the following values:

1st Year – Never Attended (U0)

1st Year – Previously Attended (U1)

2nd Year (U2)

3rd Year (U3)

4th Year (U4)

5th Year (U5)

Creating Aggregate Aid Limits

To ensure that the Packaging and Awarding processes correctly track and maintain the unique academic level limits for the ACG and SMART programs, you must create five aggregate areas for ACG1, ACG2, SMART1, SMART2, and SMART3 for each aid year.

Note. If you establish only two aggregate areas (one for ACG and one for SMART), aggregate history is not correctly reflected and both the Packaging process and the NSLDS Push for Aggregates process does not work correctly. You must define five unique aggregate areas.

Access the Aggregate Aid Limit page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limit).

Aggregate Aid Limit

Aggregate Area: ACG1 Aid Year: 2008 Federal Aid Year 2007 - 2008 [Copy](#)

Find First 1 of 1 Last

*Effective Date: 01/01/1900 Status: Active *Source: Federal

*Description: ACG1 Federal ID: ACG

Long Description: ACG1 *Financial Aid Type: Grant

Aggregate Program: ☐ Pell Grant

Undergrad Lifetime: 750.00 **Grad Limit Rule** Max Terms: ☐ Multi-Pass Processing for grade level change

Graduate Lifetime: ☐ Cumulative ☒ Distinct

Level Limits				
Aggr Lvl	Description	Aggregate Limit	Cumulative Limit	Max Terms
U0	Undergraduate Freshman - Never	750		
U1	Undergraduate Freshman	750		

Aggregate Aid Limit page

Federal ID Select *ACG* or *SMART*.

Financial Aid Type Select *Grant* when Federal ID is *ACG* or *SMART*.

Undergrad Lifetime For each aggregate area, specify one of the following limits:
(undergraduate lifetime)

ACG1 – 750.00

ACG2 – 1300.00

SMART1 – 4,000.00

SMART2 – 4,000.00

SMART3 – 4,000.00

Aggregate Level

Associate the following Aggregate Levels and corresponding Aggregate Limits to each Aggregate Area:

ACG1 for U0: 750.00

ACG1 for U1: 750.00

ACG2 for U2: 1,300.00

SMART1 for U3: 4,000.00

SMART2 for U4: 4,000.00

SMART3 for U5: 4,000.00

Mapping Aggregate Area Limits to NSLDS Aggregate Categories

Access the Aggregate Area-NSLDS Cross-Reference page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Level Translation, Aggregate Area-NSLDS Cross Reference).

Aggregate Area-NSLDS Cross-reference				
Find View 10 First 1-11 of 11 Last				
*Aggregate Area	Description	*NSLDS Aggregate		
ACG1	ACG1	ACG	+	-
ACG2	ACG2	ACG	+	-
PELL	Pell Grant	Pell	+	-
PERKINS	Carl D. Perkins Loan - ELO	Perkins	+	-
SEOG	SEOG	SEOG	+	-
SMART1	SMART1	NSG	+	-
SMART2	SMART2	NSG	+	-
SMART3	SMART3	NSG	+	-
STAFFORD	Stafford Loan - Subsidized	Subsidized	+	-
TEACH	TEACH	TEACH	+	-
UNSUB	FFELP - Unsubsidized Loan	Unsub	+	-

Aggregate Area-NSLDS Cross-reference page

Note. Ensure that you have five aggregate areas for ACG1, ACG2, SMART1, SMART2, and SMART3 for each aid year.

Setting Up Financial Aid Item Types

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

FA Item Type 1 page.

You must set up a Financial Aid Item Type for ACG1, ACG2, SMART1, SMART2, and SMART3.

Financial Aid Type	Select <i>Grant</i> .
Federal ID	Select <i>ACG</i> or <i>SMART</i> .
Aggregate Area	Select the corresponding aggregate area you set up on the Aggregate Aid Limit page to associate it with this FA Item Type.
Academic Level	Specify the corresponding HERA Academic Level for these FA Item Types: ACG1, 1st Year ACG2, 2nd Year SMART1, 3rd Year SMART2, 4th Year SMART3, 5th Year

Setting Up Award Rules for ACG and SMART Item Types

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2).

FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
SetID: PSUNV Item Type: 900000000210 ACG1_SEM Aid Year: 2009 Federal Aid Year 2008 - 2009					
Awarding Rules Find View All First 1 of 1 Last					
Effective Date: 01/01/1900 Status: Active Fed/Inst Affected: Both Fed and Inst Meet Need/Cost: Straight Need/Cost Packaging Methodology: Federal Methodology Selection Criteria:			Rounding Rules Rounding Option: Dollar Round Direction: Nearest Award Remainder Rule: Last-Dllrs Fee Remainder Rule: <input type="checkbox"/> Truncate Fees		
<input checked="" type="checkbox"/> Need Based <input checked="" type="checkbox"/> Auto Package <input type="checkbox"/> Self Help Award <input type="checkbox"/> Package Only Once <input type="checkbox"/> Lock Award <input type="checkbox"/> Equity Award <input type="checkbox"/> Don't Repackage					

FA Item Type 2 page

The following fields have specific requirements for ACG or SMART grants.

Meet/Need Cost Select *Straight Need/Cost*.

Award Remainder Rule Select *Last-Dllrs* (last dollars).

Setting Up Campus Self Service for ACG and SMART Grants

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
SetID: PSUNV Item Type: 900000000210 ACG1 SEM Aid Year: 2009 Federal Aid Year 2008 - 2009					
Award Attributes Find View All First 1 of 1 Last					
Effective Date: 01/01/1900		Status: Active			
Pass Anticipated Aid: None		Anticip Aid Expiration Days: 30			
Disbursement Method: Stdnt Acct		Auto Cancel Item Type:			
<input type="checkbox"/> Signature Required		<input type="checkbox"/> Manual Authorization		<input type="checkbox"/> Include in Transcript	
Print Letter Option: Print		<input checked="" type="radio"/> Print as Award Item		Self Service Actions	
Award Letter Print:		<input type="radio"/> Print as Other Resource		<input checked="" type="checkbox"/> Accept	
Award Message:				<input type="checkbox"/> Reduce	
				<input checked="" type="checkbox"/> Decline	

FA Item Type 3 page

From PeopleSoft Enterprise Campus Self Service, the student can:

- Accept only the entire ACG/SMART award.
- Decline the entire ACG or SMART Grant award.

Students cannot accept a reduced or partial ACG/SMART award through self-service. If students were permitted to accept a partial ACG/SMART award, it could impact any subsequent repackaging of that award. This is controlled by the FA Item Type setup pages; when an item type is defined as either ACG or SMART on the FA Item Type 1 page, the Reduce option is not available on FA Item Type 3 page.

See Also

PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, "Setting Up Financial Aid Self Service," Setting Up Self-Service Actions and Access in Packaging

Setting Up Award Limits for ACG and SMART Item Types

Access the FA Item Type 4 page. (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4).

FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
SetID: PSUNV Item Type: 900000000210 ACG1 SEM Aid Year: 2009 Federal Aid Year 2008 - 2009					
Award Limits by Term Category Find View All First 1 of 1 Last					
Effective Date: 01/01/1900 Status: Active					
*Term Category	*Minimum	*Maximum			
Regular Term	1.00	375.00	+	-	

FA Item Type 4 page

The following fields have specific requirements for ACG or SMART grants.

Award Limits by Term Category

Minimum Enter a number less than the Maximum field value.

Maximum For semester based grants, enter these maximums:

ACG1: 375.00

ACG2: 650.00

SMART1: 2,000.00

SMART2: 2,000.00

SMART3: 2,000.00

For quarter-based grants, enter these maximums:

ACG1: 250.00

ACG2: 433.00

SMART1: 1,333.00

SMART2: 1,333.00

SMART3: 1,333.00

Note. In quarter-based cases where there is an extra dollar remaining to meet the maximum award, the system assigns that dollar to the last term. For examples, 433, 433, 434 to total 1,300 and 1,333, 1333, 1334 to total 4,000.

Creating an ACG/SMART Repackaging Plan

Access the Repackaging Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Repackaging Plan).

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2008

Academic Career: UGRD Undergraduate

Repackaging Plan ID: ASG_RPKG

Repackaging Target

Find First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Processing Order: 701

Copy

+

-

*Description: ASG_RPKG

Short Description: ASG_RPKG

*Award Period: Both

Selection Criteria: FAPPELLFLAG

Equation Detail

FM Need Target: ☐ Constant ☐ Equation ☒ Percent

% Need FM: 100.0

IM Need Target: ☐ Constant ☐ Equation ☒ Percent

% Need IM: 100.0

Repackaging Rule

Find View 1 First 1 of 5 Last

Rule Nbr 1

Repackaging Rule Validate item type

Method Item Type

Item Type 900000000100 Federal Pell Grant

Limited by

☐ Validate remainder of package

☐ Reduce/Cancel disbursed amount

Rule Nbr 2

Repackaging Rule Validate item type

Method Item Type

Item Type 900000000210 ACG1_SEM

Limited by

Repackaging Plan page (1 of 2)

The screenshot displays the 'Repackaging Plan' configuration interface, showing three rules for validating item types. Each rule is a separate section with expand/collapse buttons (+/-) in the top right corner.

- Rule 3:**
 - Rule Nbr: 3
 - Repackaging Rule: Validate item type
 - Method: Item Type
 - Item Type: 900000000211 (ACG2_SEM)
 - Limited by: (empty dropdown)
 - ☐ Validate remainder of package
 - ☐ Reduce/Cancel disbursed amount
- Rule 4:**
 - Rule Nbr: 4
 - Repackaging Rule: Validate item type
 - Method: Item Type
 - Item Type: 900000000212 (SMART1_SEM)
 - Limited by: (empty dropdown)
 - ☐ Validate remainder of package
 - ☐ Reduce/Cancel disbursed amount
- Rule 5:**
 - Rule Nbr: 5
 - Repackaging Rule: Validate item type
 - Method: Item Type
 - Item Type: 900000000213 (SMART2_SEM)
 - Limited by: (empty dropdown)
 - ☒ Validate remainder of package
 - ☐ Reduce/Cancel disbursed amount

Repackaging Plan page (2 of 2)

Create a repackaging plan for your Pell eligible students (Pell Eligibility flag = Y) with the following repackaging rules:

- Rule 1: Validate Item Type = Pell Grant
- Rule 2: Validate Item Type = ACG1
- Rule 3: Validate Item Type = ACG2
- Rule 4: Validate Item Type = SMART1
- Rule 5: Validate Item Type = SMART2
- Rule 6: Validate Item Type = SMART3

Note. Select the Validate Remainder of Package check box for the last Validate Item Type rule (SMART 3) to ensure that the Repackaging process reduces the remainder of the student's package in case repackaging Pell or ACG/SMART creates an overaward condition.

The system performs the following evaluations for each Pell, ACG, and SMART award.

Pell Grant Awards

The system performs the following evaluation when repackaging Pell Grants:

- If a Pell Grant already exists in the student's package, and you are using a Repackaging plan where you validate the Pell item type, the system evaluates that Pell award in place and retains the Pell Grant at the originally assigned sequence number. The system adjusts the amount of the Pell Grant based on the student's current Pell eligibility. As a result, the amount can be increased, decreased, or remain the same.
- If a Pell Grant does not previously exist in the student's package and the student is now eligible for a Pell Grant, the new Pell award is sequenced at the top of the package (assigned the lowest sequence number).
- If there is a canceled Pell award and you repackage the student who is now Pell-eligible, the new Pell award is sequenced immediately following the canceled Pell award.

ACG1 Awards

The system performs the following evaluation when repackaging ACG1 awards:

- If an ACG1 award already exists in the student's package, and you are using a repackaging plan where you validate the ACG1 item type, the system evaluates that ACG1 award in place – it then retains the ACG1 award at the originally assigned sequence number. The system adjusts the amount of the ACG1 award based on the student's current eligibility and the disbursement protection status for the respective term(s). As a result, the amount can be increased, decreased, or remain the same.
- If an ACG1 award does not previously exist in the student's package and the student is now eligible for an ACG1 award, the award is sequenced immediately after the Pell Grant. In the unlikely event that a Pell Grant does not exist in the student's package, the ACG1 award is sequenced at the top of the package (assigned the lowest sequence number).
- If there is a canceled ACG1 award and you repackage the student who is now ACG1-eligible, the new ACG1 award is sequenced immediately following the canceled ACG1 award.

ACG2 Awards

The system performs the following evaluation when repackaging ACG2 awards:

- If an ACG2 award already exists in the student's package, and you are using a repackaging plan where you validate the ACG2 item type, the system evaluates that ACG2 award in place – it then retains the ACG2 award at the originally assigned sequence number. The system adjusts the amount of the ACG2 award based on the student's current eligibility and the disbursement protection status for the respective term(s). As a result, the amount can be increased, decreased, or remain the same.
- If an ACG2 award does not previously exist in the student's package and the student is now eligible for an ACG2 award, the award is sequenced immediately after the ACG1 award.
- If an ACG1 award does not exist, then the ACG2 award is sequenced immediately after the Pell Grant. In the unlikely event that a Pell Grant does not exist in the student's package, the ACG2 award is sequenced at the top of the package (assigned the lowest sequence number).
- If there is a canceled ACG2 award and you repackage the student who is now ACG2-eligible, the new ACG2 award is sequenced immediately following the canceled ACG2 award.

SMART1 Awards

The system performs the following evaluation when repackaging SMART1 awards:

- If a SMART1 award already exists in the student's package, and you are using a repackaging plan where you validate the SMART1 item type, the system evaluates that SMART1 award in place – it then retains the SMART1 award at the originally assigned sequence number. The system adjusts the amount of the SMART1 award based on the student's current eligibility and the disbursement protection status for the respective term(s). As a result, the amount can be increased, decreased, or remain the same.
- If a SMART1 award does not previously exist in the student's package and the student is now eligible for an SMART1 award, the award is sequenced immediately after the ACG2 award. If an ACG2 award does not exist, then the SMART1 award is sequenced immediately after the ACG1 award or Pell Grant. In the unlikely event that a Pell Grant does not exist in the student's package, the SMART1 award is sequenced at the top of the packaged (assigned the lowest sequence number).
- If there is a canceled SMART1 award and you repackage the student who is now SMART1-eligible, the new SMART1 award is sequenced immediately following the canceled SMART1 award.

SMART2 Awards

The system performs the following evaluation when repackaging SMART2 awards:

- If a SMART2 award already exists in the student's package, and you are using a repackaging plan where you validate the SMART2 item type, the system evaluates that SMART2 award in place – it then retains the SMART2 award at the originally assigned sequence number. The system adjusts the amount of the SMART2 award based on the student's current eligibility and the disbursement protection status for the respective term(s). As a result, the amount can be increased, decreased, or remain the same.
- If a SMART2 award does not previously exist in the student's package and the student is now eligible for an SMART2 award, the award is sequenced immediately after the SMART1 award. If an SMART1 award does not exist, then the SMART2 award is sequenced immediately after the ACG2, ACG1, or Pell Grant. In the unlikely event that a Pell Grant does not exist in the student's package, the SMART2 award is sequenced at the top of the package (assigned the lowest sequence number).
- If there is a canceled SMART2 award and you repackage the student who is now SMART2-eligible, the new SMART2 award is sequenced immediately following the canceled SMART2 award.

SMART3 Awards

The system performs the following evaluation when repackaging SMART3 awards:

- If a SMART3 award already exists in the student's package, and you are using a repackaging plan where you validate the SMART3 item type, the system evaluates that SMART3 award in place - it then retains the SMART3 award at the originally assigned sequence number. The system adjusts the amount of the SMART3 award based on the student's current eligibility and the disbursement protection status for the respective term(s). As a result, the amount can be increased, decreased, or remain the same.
- If a SMART3 award does not previously exist in the student's package and the student is now eligible for an SMART3 award, the award is sequenced immediately after the SMART2 award. If an SMART2 award does not exist, then the SMART3 award is sequenced immediately after the SMART1, ACG2, ACG1, or Pell Grant. In the unlikely event that a Pell Grant does not exist in the student's package, the SMART3 award is sequenced at the top of the package (assigned the lowest sequence number).

- If there is a canceled SMART3 award and you repackage the student who is now SMART3-eligible, the new SMART3 award is sequenced immediately following the canceled SMART3 award.

Setting Up Disbursement Rules for ACG and SMART Grants

This section discusses how to:

- Set up disbursement rules for ACG and SMART grants.
- Define authorization rules for ACG and SMART grants.

See Also

Chapter 15, "Setting Up Disbursement Rules," Defining Item Type Disbursement Rules, page 453

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Processing Class Enrollment Transactions,"
Processing Enrollment Transactions Through the Enrollment Component

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your
Academic Structure," Defining Subject Areas

Pages Used to Assign Item Type Disbursement Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Indicators	DISB_RULE_ITM1	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Indicators	Define disbursement authorization rules for a financial aid item type.
Groups/Thresholds	DISB_RULE_ITM2	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Groups/Thresholds	Define additional restrictions necessary for disbursement of the item type.

Setting Up Disbursement Rules for ACG and SMART Grants

Access the Indicators page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Indicators).

Indicators Groups/Thresholds Checklists/Tracking

Item Type: 900000000435 Federal SMART Grant Aid Year: 2008
Academic Career: Undergraduate Institution: PSUNV

Indicators End First 1 of 1 Last

Eff Date: 01/01/1900 Status: Active Copy Setup Data

Descr: Federal SMART Grant Short Desc: Federal SM

<input type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career	<input type="checkbox"/> Post Disb Red Ctrl - Census Dt
<input type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold	<input type="checkbox"/> Post Disb Reduction Control
<input type="checkbox"/> Verification Complete	<input type="checkbox"/> Must Meet Satisfactory Prog	<input type="checkbox"/> ASG HERA Level Match
<input type="checkbox"/> Official Fed EFC	<input type="checkbox"/> Hold Disb Fed Overaward	<input type="checkbox"/> ASG CIP Code Match
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward	<input type="checkbox"/> ASG Minimum GPA
<input type="checkbox"/> Bdgt/Term Level Match	<input type="checkbox"/> Hold If Withdrawn	<input type="checkbox"/> ASG Incomplete Grades
<input type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees	<input type="checkbox"/> ASG Pell Grant Awarded
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment	

SMART Enrollment Verification:

Load Level Rules

<input type="checkbox"/> Bdgt/Term Load Match	Disbursement Proration Rule:
<input checked="" type="checkbox"/> Awd/Term Load Match	Use Current Load:

Indicators page

Use this page to select specific rules used to hold disbursements of financial aid monies.

ASG HERA Level

Match (ACG/SMART grant HERA level match)

Select this check box to compare the HERA level in the grant eligibility record with the beginning of term HERA level in FA Term. Authorization fails if the values do not match.

ASG CIP Code Match
(ACG/SMART grant Classification of Instructional Programs code match)

Select this check box to compare the CIP code stored in the grant eligibility record to the student's derived CIP code from Student Records data, which is from the student's program, plan, or sub-plan and the CIP Code source setting in the ACG/SMART Processing Options page.

Authorization fails if the values do not match. If the student has more than one CIP code due to having multiple active programs, plans, or sub-plans, one match satisfies the rule.

ASG Minimum GPA
(ACG/SMART grant minimum grade point average)

Select this check box to verify that the current GPA meets the minimum GPA assigned for the item type ASG Minimum GPA field.

For non 2nd year ACG item types, the GPA from the current FA Term record is used. If the award is defined as a second year ACG grant, then the GPA that is checked is the current GPA for the term where the student completed their HERA level 1.

Note. The rule fails for new transfer students awarded 2nd year ACG and first time financial aid recipients because they would not have any prior FA Term information. Use the disbursement override functionality to disburse the award.

ASG Incomplete Grades (ACG/SMART grant incomplete grades)	Select this check box to check for any enrolled course prior to the current term where the grade is still considered in progress (a final grade has not yet been posted). Only courses requiring a grade are checked. If the rule fails, the term in which the course is enrolled displays an error message.
ASG Pell Grant Awarded (ACG/SMART and Pell grant awarded)	Select this check box to verify that the student has been awarded and has accepted a Pell grant for the current aid year.
SMART Enrollment Verification	<p>Select the value to verify that the student is enrolled in at least one course for the student's SMART grant eligible major. Values are:</p> <p><i>Course Catalog</i>: Checks for matching eligible CIP course code in the Course Catalog table.</p> <p><i>Subject Table</i>: Checks for matching eligible CIP course code in the Academic Subject table.</p> <hr/> <p>Note. The assignment of CIP codes in the Course Catalog Table or Academic Subject Table is not required setup and so this rule might not be available to all institutions. Consult with Student Records staff to determine if this rule can be used and if yes, for which table.</p> <p>In addition, the rule does not take into consideration any individual override of the student's enrolled courses by their academic advisor. An academic advisor could determine that an enrolled course is acceptable for the student's major regardless of the setup. These cases cannot be recognized by the new rule and must be authorized using the current disbursement override functionality.</p> <hr/>

Defining Authorization Rules for ACG and SMART Grants

Access the Groups/Thresholds page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Groups/Thresholds).

The screenshot shows the 'Groups/Thresholds' tab selected. At the top, there are three tabs: 'Indicators', 'Groups/Thresholds', and 'Checklists/Tracking'. Below the tabs, the 'Item Type' is '900000000405 Federal SMART Grant', 'Academic Career' is 'Undergraduate', 'Aid Year' is '2008', and 'Institution' is 'PSUNV'. The 'Thresholds' section is active, showing a table with one row: 'Federal SMART Grant 1'. Below the table, there are several input fields for setting thresholds, including 'Ethnic Group', 'Res State', 'Acad Stand Hold', 'Country', 'Form of Study', 'Group', 'Sport', 'Acad Plan', 'Athletic Participation Code', 'Sub-Plan', 'FFELP Tolerance Amount', 'Tolerance Amount', 'Min GPA on FA Term', 'ASG Minimum GPA', 'Min GPA Prior FA Term', 'Minimum Units', and 'Use Current Units'.

Groups/Thresholds page

The ASG Minimum GPA field displays the GPA used by the ASG Minimum GPA rule. You can update this field only if the ASG Minimum GPA check box is selected on the Indicators page.

Writing and Using Equations for ACG and SMART Eligibility

This section provides an overview of equations used for ACG and SMART eligibility and discusses how to:

- Design HERA equations.
- Write equations for specific grant functions.
- Use delivered equations for HERA eligibility evaluation.

Understanding Equations Used for ACG and SMART Eligibility

This section describes the following components:

- Equation groups.
- Equation Engine variables.
- Evaluation of equation results.

Equation Groups

Use one equation group per award type (ACG1, ACG2, SMART1, SMART2, SMART3). Within the equation group, specify the order to run the equations by setting the sequence.

Equation Engine Variables

The global variables listed here are available to all equations in the equation group. The variables listed in the first column are passed in and can be updated by the equation. The variables listed in the second column are examined when returned from each equation.

<i>Updateable Global Variables</i>	<i>Global Variables Returned from Equations</i>
EMPLID	RESULT
INSTITUTION	MESSAGE_SET_NBR
AID_YEAR	MESSAGE_NBR
STRM	
TABLE_ID (hardcoded value of '1')	
SFA_ASG_ACAD_LEVEL	
SFA_ASG_ACLVL_OVRD	
SFA_COD_ELIGRSN_CD	
SFA_COD_HS_PROG_CD	
CIP_CODE	
SFA_ASG_CIPCD_OVRD	
GPA	
SFA_ASG_GPA_OVRD	
SFA_ASG_DISB_PRTCT	
REVIEW_FLAG (valid values: blank or Y)	

The global variables RESULT, MESSAGE_SET_NBR, and MESSAGE_NBR are reset before each equation calculation.

All other global variables are set before the first equation group is called.

If an equation updates the value of a global variable (other than RESULT, MESSAGE_SET_NBR, and MESSAGE_NBR), the new value is passed on to any subsequent equations that are called.

After all equations in an equation group have been executed, any changes to the global variables (other than EMPLID, INSTITUTION, AID_YEAR, STRM, TABLE_ID, REVIEW_FLAG, RESULT, MESSAGE_SET_NBR, and MESSAGE_NBR) are saved in the Eligibility tables.

Any MESSAGE_SET_NBR and MESSAGE_NBR values generated by each equation are saved in the Eligibility tables.

Evaluation of Equation Results

Results from all equations called are evaluated with an AND condition:

- If an equation returns a blank RESULT, it is not be included in the AND condition.
- If all equations return a RESULT of PASSED, the student status is *Eligible*.
- If one or more equations return a RESULT of FAILED, the student status is *Ineligible*.
- If one or more equations return a RESULT of UNDETERMINED, and all other equations returned a RESULT of PASSED, the student status is *Eligible, pending review*.
- If the REVIEW_FLAG is set to Y, the student status is *Eligible, pending review* or *Ineligible, pending review*.

In the following examples of equation group RESULTS, UNDTRMND indicates UNDETERMINED.

<i>Equation1</i>	<i>Equation2</i>	<i>Equation3</i>	<i>EquationN</i>	<i>REVIEW_FLAG</i>	<i>Student Status Eligibility</i>
PASSED	PASSED	PASSED	PASSED		Eligible
PASSED	PASSED	UNDTRMND	PASSED		Eligible, pending review
FAIL	FAIL	FAIL	FAIL		Ineligible
FAIL	PASSED	PASSED	PASSED		Ineligible
PASSED	FAIL	UNDTRMND	UNDTRMND		Ineligible
FAIL	UNDTRMND	UNDTRMND	UNDTRMND		Ineligible
UNDTRMND	UNDTRMND	UNDTRMND	UNDTRMND		Eligible, pending review
PASSED	PASSED	PASSED	PASSED	Y	Eligible, pending review
PASSED	PASSED	UNDTRMND	PASSED	Y	Eligible, pending review
FAIL	FAIL	FAIL	FAIL	Y	Ineligible, pending review
FAIL	PASS	PASSED	PASSED	Y	Ineligible, pending review
PASSED	FAIL	UNDTRMND	UNDTRMND	Y	Ineligible, pending review
FAIL	UNDTRMND	UNDTRMND	UNDTRMND	Y	Ineligible, pending review
UNDTRMND	UNDTRMND	UNDTRMND	UNDTRMND	Y	Eligible, pending review

Designing HERA Equations

You can design equations to:

- Update an existing field in the eligibility record. For example, an equation can set the GPA value.
- Post non-evaluation related messages to the user.
- Set a review flag to ensure a student is reviewed.
- Run in a set sequence so that the results of one equation can be used by later equations.

All equations must return a message (message set number and message number) so that it can be displayed to the user.

Equations that perform evaluations for grant eligibility must return a result (PASSED, FAILED, UNDETERMINED) *and* a message (message set number and message number).

Creating Equation Groups for Special Purposes

You can create special equation groups to evaluate special business processes such as a census reevaluation of eligibility or renewing eligibility for subsequent terms. These may not require the same equations used to make the initial eligibility determination. For example, you could create a special equation group for students already made eligible that would perform census date re-evaluations that only check the student's current enrollment and GPA.

Updating Fields in the Grant Eligibility Record

To update fields in the eligibility record, set the corresponding global variable for the field you want to update with your value. If you use equations that use an eligibility record field that has been updated by another equation, ensure that the equations are executed in the correct sequence. The Grant Eligibility Status field cannot be set by an equation.

Using the Override Fields on the Eligibility Record

If you write equations that update those fields with a corresponding override field, such as HERA Academic Level, CIP Code, or GPA, add logic to check the override field setting and not replace the current value as needed.

Writing Equations for Specific Grant Functions

Here are some guidelines for writing equations for the grant process.

Equations designed to evaluate grant eligibility criteria must generate a RESULT and a message (message set number and message number). The possible result can be PASSED, FAILED, or UNDETERMINED:

- Use PASSED if the student meets the conditions of the equation.
- Use FAILED if the student not only does not meet the conditions of the equation criteria, but also makes the student ineligible for the grant.

- Use **UNDETERMINED** if the criteria of the equation is not met, but you do not want to assign **FAILED**, such as cases where not enough information is available to make a **PASSED** or **FAILED** result, but information is expected so that a final result can be determined.

For each result, set a corresponding message catalog entry. The message appears on the ACG/Grant Eligibility pages to communicate how the equation result was determined.

The overall grant eligibility status is based on the evaluation of results from all equations in the equation group. You can write several simple individual equations to pass information. These equations do not determine the student's eligibility status for the grant themselves, but as a part of the equation group.

Requiring a Student to Be Reviewed

The **REVIEW_FLAG** variable field automatically forces a record to be resolved by manual review. When the grant process reviews all equation group results, if any equation sets the **REVIEW_FLAG** to **Y**, the status is either *Eligible, pending review* or *Ineligible, pending review*.

Note. These status values can be set without setting the **REVIEW_FLAG**. You can create an equation that determines whether the student is a new transfer student and set the review flag to force the record to be reviewed so that the GPA calculation is performed manually.

Equation Security

For information about Equation Engine security, refer to the chapters on setting up and using the Equation Engine in the *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*.

Identifying Equations to Be Used by ACG, SMART, or Both

To associate an equation with ACG or SMART processing, an Equation Engine application prompt must be assigned to the equation. Adding an application prompt for a grant type allows the equation to be included in an equation group for that grant type. The application prompt is assigned on the Equation Engine Editor page. The valid application prompts are in:

- Fin Aid ACG Grant Eval
- Fin Aid SMART Grant Eval

Using Delivered Equations for HERA Eligibility Evaluation

The following equations were created to test the PeopleSoft Campus Solutions grant review process. Some might be applicable for use at your institution. Others might be used to develop similar equations that are more applicable based on your business requirements.

Completed Equations

FAASSCIPFATM

Description	<p>Uses the CIP Code source and the student's academic program, plan, and sub-plan information stored in FA Term to determine the CIP code.</p> <p>The equation does not verify that the CIP code is SMART eligible.</p>
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Results	Assigns the student's CIP code.
Design notes	<p>This should be the default equation used by most schools to determine the CIP code.</p> <p>This equation is intended to be assigned on the ACG/SMART Processing Options page and should not be used in equation groups.</p> <p>The equation currently passes a result and messages, but because it is not called from an equation group, they do not appear on the page. This does not affect how the equation determines CIP code.</p>
Suggested local modification	None

FAASSCIPELIG

Description	Evaluates the student's CIP code stored in the grant tables for SMART eligibility.
Results	<p>PASSED: CIP code is SMART eligible.</p> <p>FAILED: CIP code is not eligible or CIP code is blank.</p>
Design notes	This should be a mandatory equation for SMART equation groups.
Suggested local modification	Logic eventually must be added for handling renewal awards where the qualifying CIP code is no longer eligible for new awards. Currently there are no CIP codes that lose eligibility for SMART.

FAASSPELLELG

Description	Verifies that the student is Pell eligible based on current ISIR data.
Results	<p>PASSED: Student is Pell eligible.</p> <p>FAILED: Student is not Pell eligible.</p> <p>UNDETERMINED: An ISIR does not exist.</p>
Design notes	Equation finds the last official ISIR loaded and determines whether the PS_ISIR_CONTROL.PELL_ELIGIBILITY field value is Y.
Suggested local modification	None

FAASSFTLOAD

Description	Verifies that the student's FA load in FA Term is full time.
Results	<p>PASSED: Student is full time.</p> <p>FAILED: Student is not full time.</p>
Design notes	<p>Equation gets the current FA_LOAD value from FA Term to verify full-time status.</p> <p>Useful before the student enrolls for the term. After the term begins, switch to monitoring the current load in FA term.</p>

Suggested local modification	None
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FAASSCURLOAD

Description	Verifies that the student's current load in FA Term is full time.
Results	PASSED: Student is full time. FAILED: Student is not full time.
Design notes	Equation gets the current FA LOAD_CURRENT value from FA Term to verify full-time status. Useful after the term has begun. Can be used as part of a census re-evaluation.
Suggested local modification	None

FAASSNSLDSG

Description	Checks the NSLDS history tables for previously reported ACG eligibility.
Results	No results are set.
Design notes	This equation sets the REVIEW_FLAG if ACG history data exists. This causes the record to be reviewed manually to complete the review. A message also appears on the grant eligibility page.
Suggested local modification	Can be modified to read the eligibility criteria met and use the same values for the current eligibility record.

FAASSCRTMGPA

Description	Assigns the GPA from Term History (PS_STDNT_CAR_TERM.CUM_GPA).
Results	No results are set.
Design notes	Messages appear on the grant eligibility page to indicate whether the GPA was updated. The equation respects the GPA override.
Suggested local modification	Calculate a new GPA based on manipulating the STDNT_CAR_TERM enrollment information.

FAASSTERMGPA

Description	Assigns the student's GPA from the cumulative GPA field on FA Term.
Results	No results are set.

Design notes	<p>Messages appear on the grant eligibility page to indicate whether the GPA was updated.</p> <p>The equation respects the GPA override.</p>
Suggested local modification	Modify to use the calculated GPA if an override GPA is not acceptable to use.

FAASDACG2GPA

Description	GPA check for ACG2 recipients.
Results	<p>PASSED</p> <p>FAILED</p> <p>UNDETERMINED</p>
Design notes	<p>The equation performs the same check as disbursement authorization does for ACG2 recipients. It looks for the earliest FA Term record that the student was enrolled where the beginning of term HERA level is 1 and the end of term level is 2. The GPA threshold is hard coded for 3.0.</p> <p>If no FA Term record that meets the criteria can be found, UNDETERMINED is set. This may be a new transfer student or one who had not applied for financial aid in previous terms.</p>
Suggested local modification	<p>Modify the GPA if your school uses a different grading scale.</p> <p>Modify the beginning of term HERA level to include 0 – 1st year, never attended.</p>

FAASDCITIZEN

Description	Verifies the student's citizenship and eligible noncitizen status.
Results	<p>PASSED</p> <p>FAILED</p> <p>UNDETERMINED</p>

Criteria	<p>If the aid year is 2009 or earlier:</p> <p>Get the current effective dated row in PS_ISIR_STUDENT.</p> <p>If CITIZENSHIP_STATUS = 1,</p> <p>If PS_STDNT_AID_ATRBT.SSA_CITIZENSHIP_IND = 'A' OR '', or SSA_CITIZEN_OVRD = Y,</p> <p>then PASSED,</p> <p>If not, then FAILED,</p> <p>If no ISIR_STUDENT row exists, then UNDETERMINED.</p> <p>A different message appears depending on the result.</p> <p>If the aid year is 2010 or later:</p> <p>Get the current effective dated row in PS_ISIR_STUDENT.</p> <p>If CITIZENSHIP_STATUS = 1,</p> <p>If PS_STDNT_AID_ATRBT.SSA_CITIZENSHIP_IND = 'A' OR '', or SSA_CITIZEN_OVRD = Y,</p> <p>then PASSED,</p> <p>If not, then FAILED,</p> <p>If CITIZENSHIP_STATUS = 2,</p> <p>If PS_STDNT_AID_ATRBT.INS_MATCH = Y, or ISIR_SEC_INS_MATCH = Y, or INS_MATCH_OVRD = Y,</p> <p>then PASSED,</p> <p>If PS_STDNT_AID_ATRBT.INS_MATCH is Not Y and ISIR_SEC_INS_MATCH = P, C, X,</p> <p>then UNDETERMINED,</p> <p>If CITIZENSHIP_STATUS is Not 1 or 2, then FAILED,</p> <p>If no PS_ISIR_STUDENT record, then UNDETERMINED.</p>
Messages (Set 14426)	<p>5010: PASSED: US citizenship/eligible non-citizenship has been confirmed</p> <p>5011: FAILED: US citizenship/eligible non-citizenship has not been confirmed</p> <p>5012: UNDETERMINED: Not enough citizenship data exists for the student</p>
Suggested local modification	Equation does not check ISIR comment codes or the alien registration number reported.

Equation Templates

The following equations are examples of how to accomplish a specific evaluation. They are not intended to function at your institution without modification. You should create new equations to use any of the described functionality.

FAASDACGCHKL

Description	ACG eligibility determined based on the student having a completed checklist.
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Results	PASSED (and REVIEW_FLAG is set to Y) UNDETERMINED
Design notes	A customer suggested this equation during the Alliance conference. The equation assumes that a completed ACG checklist indicates that the student is eligible. The REVIEW_FLAG is set so that the user must review the student's information to determine the actual eligibility criteria the student met. No review of the checklist items is performed.
Suggested local modification	Schools must create a new SQL statement to replace the delivered FAAS_COMPLETE_CHKLIST_EXIST if they use different checklist names. If a school uses checklists as the only method for determining ACG eligibility, it could enhance it by: <ul style="list-style-type: none"> • Creating unique Checklist Items that represents the actual condition that the student met to be eligible for ACG – HS program, AP/IB, rigorous coursework. The equation could be modified to assign the eligibility reason code based on the existence of the relevant checklist item. If this were done, the REVIEW_FLAG would not be required to be set. The State program code could be assigned as well. • Creating a unique message if the checklist exists, but the checklist is not complete. This would probably pass UNDETERMINED status, but a new message, such as <i>ACG grant checklist exists, but is currently in progress.</i>

FAASDACGISIR

Description	Determines whether the student self reported ACG eligibility on the ISIR. Makes ineligible for ACG if the student did not self-report.
Results	PASSED FAILED
Design notes	A customer suggested this equation during the Alliance conference. If an ACG self-identifying comment does not exist, the FAILED status makes the student ineligible. The equation checks all loaded ISIRs for the student for the existence of comments 267, 268, 269, or 270. If any were received, the equation passes. If none exist, the equation fails.
Suggested local modification	This equation can be modified so that it is merely informational and a message appears on the Grant Eligibility page. Do not set the RESULT to FAILED if no comment exists. Set no result. Can be modified to only check the current loaded ISIR for comments. Can check the ISIR staging tables instead of only the loaded ISIR data.

FAASDACGRIG

Description	Checks to see if the student meets the ED eligibility criteria for ACG based on External Education, External Subject information.
Results	PASSED FAILED UNDETERMINED
Design notes	<p>This equation is based on a current customer practice. This assumes that the school updates the student's external education records with ACG-specific external subject codes after review by staff.</p> <p>Each external subject code indicates the eligibility criteria met by the student. The codes and their meaning are:</p> <ul style="list-style-type: none"> • ACG1 – Student meets state scholars requirement. • ACG2 – Student meets ED high school ACG requirement. • ACG3 – Student meets the AP/IB ACG requirement. • ACG4 – Student not eligible for ACG. <p>Based on the entered code, the ACG Eligibility reason field can be set by the equation, as well as the state High School program code. Currently the equation only sets ACG Eligibility Reason Code 1 (if ACG1 is posted), but can be modified to set 2 (if ACG3 exists) and 3 (if ACG2 exists).</p> <p>If none of the external subject codes are found, the equation passes an UNDETERMINED status, which prevents a final status from being updated by the process. This assumes that all ACG candidates have one of these codes to indicate eligibility.</p> <p>The equation looks at the external subject table without regard to what type of external data is present.</p>
Suggested local modification	In addition to modifying the external subject codes you use (and creating a new equation SQL routine), if you can determine the high school program code to assign, that logic can also be entered. This can be accomplished by creating additional external subject codes.

FAASDACGSGRP

Description	ACG eligibility check using student groups.
Results	PASSED (and REVIEW_FLAG is set to Y) FAILED UNDETERMINED

Design notes	<p>This equation was suggested by a few schools based on how they currently track whether or not a student is eligible for ACG. The equation is designed to identify if the student has an eligible student group. If so, the review flag is set so that the record must be reviewed manually in order to indicate the ACG eligibility reason code required by COD. If the student has an ineligible student group value, the student is made ineligible. If no student group data exists, the STATUS is set to UNDETERMINED, which prevents the system from automatically setting a final eligibility status.</p> <p>Two student groups were created: ACG1 to represent ACG eligibility and ACG4 to represent ineligibility for ACG. The equation checks for the existence of these student groups. If none exists, UNDETERMINED is set so that the record is reprocessed. If ACG1 exists, PASSED is set with the REVIEW_FLAG. This would cause an Eligible, pending status (assuming all other equations passed) so that a manual review can be performed and the actual eligibility criteria determined. If ACG4 is found, FAIL is set, which makes the record ineligible.</p>
Suggested local modification	<p>The equation searches for only two student groups. This can be expanded to handle more student group codes.</p> <p>If a student group value is tied to a specific ACG eligibility reason code, then this value can be assigned by the equation and written to the eligibility table. If this is done, then the setting of the REVIEW_FLAG may not be necessary.</p> <p>If not all ACG candidates use student groups to determine eligibility, you could modify the equation to not set an UNDETERMINED result if no group exists.</p>

FAASDAPTEST

Description	ACG check to see if the student has met the AP requirement for ACG by examining the external test score tables.
Results	<p>PASSED</p> <p>FAILED</p> <p>None</p>
Design notes	<p>This checks the PS_STDNT_TEST_COMP tables for records where the TEST_ID = AP when the SCORE is greater than or equal to 3.0. This table is populated by the external test score load process.</p> <p>If two or more AP rows that meet the criteria are selected, the equation PASSED. If not, then it FAILED. If no rows exist, no result is set.</p>
Suggested local modification	<p>Equation might require modification to only check scores that are accepted by the school. The equation currently checks all loaded test scores that are AP.</p> <p>If IB scores can also be loaded into this record, then modify the equation to include IB test scores.</p>

FAASDAPTSTEX

Description	ACG check to see if the student has met the AP or IB requirement for ACG by examining the student's external transcript data.
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Results	PASSED FAILED None
Design notes	The equation uses SQL routines to check the PS_EXT_ACAD_SUBJ for AP and IB subjects. If no subjects exist, no result is set and a message is posted. If subjects exist, the equation passes or fails based on the selected rows.
Suggested local modification	Equation uses the external GPA value as the basis of the AP/IB score. This might require modification if schools capture the score elsewhere in the record.

FAASDCKHERAL

Description	HERA level check. The student's level is calculated without test credits and compared with the current HERA level. If different, the REVIEW_FLAG is set.
Results	PASSED FAILED (and REVIEW_FLAG is set to Y)
Design notes	This equation calculates the HERA level by taking the total cumulative units and subtracting all test credit units. Using the same level rule as the FA Term process, the HERA level is determined and then compared with the FA Term calculated level. If they do not match, then a FAILED result is set and the REVIEW_FLAG is set to Y. If the levels match, PASSED is the result.
Suggested local modification	Modify to perform an alternate total number of completed units value that your school prefers to use.

FAASDGRADDT1

Description	High School graduation date check from the external education (transcript) tables.
Results	PASSED FAILED UNDETERMINED
Design notes	Because this structure does not actually have a graduation date field, some customers use the PS_SFA_EXT_ACAD.TO_DT field for this purpose. The equation checks the TO_DT for all records where EXT_CAREER = HS. Based on the student's level, the high school graduation date requirement differs. If a high school record exists with no TO_DT value, the result is UNDETERMINED. If the TO_DT exists, the equation results in either PASSED or FAILED. Level 0,1: 01/01/06 and after Level 2: 01/01/2005 and after
Suggested local modification	Additional criteria might be added to further validate the transcript information. You might combine this equation with FAASDGRADDT2.

FAASDGRADDT2

Description	High school graduation check from the admissions application.
Results	PASSED FAILED UNDETERMINED
Design notes	<p>This equation looks at the admissions application data structure for the graduation date at the last school attended. The school must belong to a specific user-defined school type.</p> <p>Based on the student's level, the high school graduation date requirement differ. If a high school record exists with no GRADUATION_DATE value, the result is UNDETERMINED. If the GRADUATION_DATE exists, the equation results in either PASSED or FAILED.</p> <p>Level 0,1: 01/01/06 and after Level 2: 01/01/2005 and after</p>
Suggested local modification	<p>The school type defined in the equation must be modified.</p> <p>You might combine this equation with FAASDGRADDT1.</p>

FAASDINCMPLT

Description	<p>Checks to see if the student has an incomplete graded course in a past term.</p> <p>If one exists, set the REVIEW_FLAG and post message.</p>
Results	None
Design notes	<p>Similar to what is performed by disbursements, this equation uses the FAASS_GET_INCOMPL_GRADE SQL to select any courses with either an incomplete or missing grade in a course where the session end date has already passed.</p>
Suggested local modification	<p>SQL might require updating to modify the grade marks that represent an incomplete grade at your school. Currently, 'I' and blank are hard-coded in the SQL.</p> <p>May want the SQL to not include any courses in the same term as the equation is evaluating.</p> <p>Modify the equation to set a FAILED result instead of only setting the review flag.</p>

FAASSWEEKINS

Description	<p>Checks for any posted transfer coursework for the student where no FA Weeks Calculation Statistics have been calculated.</p> <p>Use this equation to identify potential review candidates when running the grant eligibility process. This equation sets the review flag, which prevents an eligibility record from being set to an <i>Eligible</i> or <i>Ineligible</i> status. To update any new transfer work, you must rebuild FA Term to recalculate the HERA level of the student, and then rerun the eligibility process.</p>
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Results	<p>PASSED, REVIEW FLAG set to <i>Y</i></p> <p>PASSED, REVIEW FLAG set to <i>N</i></p>
Design notes	<ol style="list-style-type: none"> 1. Get the max effective dated, ACTIVE row in STDNT_FA_TERM for the student with the same term value and get the career (ACAD_CAREER), academic program (ACAD_PROG_PRIMARY) and academic plan (ACAD_PLAN) values. 2. Using the EMPLID, ACAD_CAREER, ACAD_PROG and ACAD_PLAN, look for a match in PS_TRNS_CRSE_SCH <p>Where any of the following fields is greater than 0: TRF_TAKEN_GPA, TRF_TAKEN_NOGPA, TRF_PASSED_GPA, TRF_PASSED_NOGPA, UNT_TAKEN, UNT_TRNSFR</p> <p>If no row exists, then Result = PASSED.</p> <p>Message (14426, 5160): No posted transfer coursework for the student's career, program, and plan.</p> <p>If a row exists, check PS_TRNS_CRSE_TERM (join on EMPLID, ACAD_CAREER, INSTITUTION, MODEL_NBR)</p> <p>Check the value of these fields:SSR_FAWI_TKN, SSR_FAWI_TKN_GPA, SSR_FAWI_TKN_NOGPA, SSR_FAWI_PSD, SSR_FAWI_PSD_GPA, SSR_FAWI_PSD_NOGPA</p> <p>If any is greater than 0, then Result = PASSED</p> <p>Message (14426, 5161): Transfer weeks of instruction review appears to have been completed</p> <p>If none (all fields are 0 or blank), then set REVIEW FLAG to Y and Result = PASSED</p> <p>Message (14426, 5162): Student appears to have posted transfer coursework that requires review.</p> <p>Note. Equation cannot determine whether any posted transfer work with 0 in the FAWI fields was reviewed and no units were allowed. For example, all credit was earned while enrolled in an ineligible program or the credits were exclusively AP or International Baccalaureate (IB) courses.</p>
Suggested local modification	Can be used as a template for creating an equation that checks the transfer test credit or other transfer credit records.

Special Use Equations

FAASDCIPSR

Description	<p>Determines the CIP code the same as in FAASCIPFATRM, except that it uses the student's program, plan, and sub plan information in Student Records rather than the Financial aid Term record.</p> <p>The equation does not verify that the CIP code is SMART eligible.</p>
Results	None

Design notes	This is an alternate CIP code equation intended as an example of using non FA Term information to determine the CIP code. This equation is not intended to be used in equation groups, but is set on the ACG/SMART Processing Options page.
Suggested local modification	The equation is coded to get the same results as the FAASCIPFATRM equation. Additional modification is required in order to determine which code to select when the student has multiple programs, plans, or subplans.

FAASDHERALVL

Description	Alternate HERA level calculation that does not include test credits in the total units used to calculate the student's level.
Results	None
Design notes	<p>An alternate equation that is set on the ACG/SMART Processing Options page. If not used, the HERA level calculated by the FA Term process is used. This calculates and assigns the student's HERA level stored in the grant record.</p> <p>This is similar to the equation FAASDCKHERAL.</p> <p>If used, may cause conflicting level values between the grant record and FA Term. The FA Term value must match in order for awarding and disbursements to function.</p>
Suggested local modification	Modify to derive a total completed units based on your institution's requirements.

FAASDACGDRVR

Description	ACG Driver Equation. Calls multiple existing equations for an ACG eligibility determination.
Results	<p>PASSED</p> <p>FAIL</p> <p>UNDETERMINED</p>

Design notes	<p>For the ACG grant, the student must only meet one of the rigorous study requirements to become eligible. This conflicts with the equation group evaluation logic. If one failed, then the eligibility status would become Ineligible (or Ineligible, pending review if the review flag was set). This equation reviews the results for each equation called and sets a PASSED status if only one equation passes and the rest either fail or are undetermined.</p> <p>This equation processes the results for each attached equation in sequence. When a PASSED result occurs, the driver equation stops. If no called equation passes, then if one resulted in UNDETERMINED, the driver equation results in UNDETERMINED. If none resulted in UNDETERMINED, then the driver equation results in FAILED.</p> <p>This equation demonstrates how to call the following equations: FASSDAPTEST, FAASDAPTSTEX, FAASDACGRIG, FAASDACGCHKL, FAASDACGSGRP.</p> <p>Equations that are added must be able to set a result status of PASSED, FAILED, and UNDETERMINED.</p> <p>Any individual equation called from this main equation should not be used in the same equation group, as it has already been called.</p> <p>An example equation group using this driver equation would contain:</p> <ul style="list-style-type: none"> • FAASDACGDRVR – to determine whether the ACG requirement is met. • FAASSPELLELG – Pell check. • FAASDCITIZEN – US Citizenship check. • FASSFTLOAD – Full time load check.
Suggested local modification	Schools must add the equations they require to be executed.

Chapter 7

Setting Up External Awards

This chapter provides an overview of external awards and discusses how to:

- Set up external award processing.
- Define search and match criteria.
- Plan for File Parser and External Award processing.

Understanding External Awards

This section discusses:

- Types of external award data.
- Data sources and methods to obtain external awards.
- Data flow of external awards to student award tables.
- Special consideration for Student Financial payments.
- Awarding Loan Certifications as external awards.

Types of External Award Data

In most instances, external awards are already determined for a student by an external entity. However, information about a student's external award must be accounted for and posted to a student's award package to determine the effect on a student's total financial aid package and financial need.

External award or resource data can originate from various sources:

- State agencies providing data on state grant awards.
- Internal academic departments providing data on departmental scholarship awards.
- Students directly providing information about outside or private scholarship and grant awards.
- Student financial department providing payment transactions that have already been acknowledged on a student's (SF) account, such as waivers or third-party contract payments.

Data Sources and Methods to Obtain External Awards

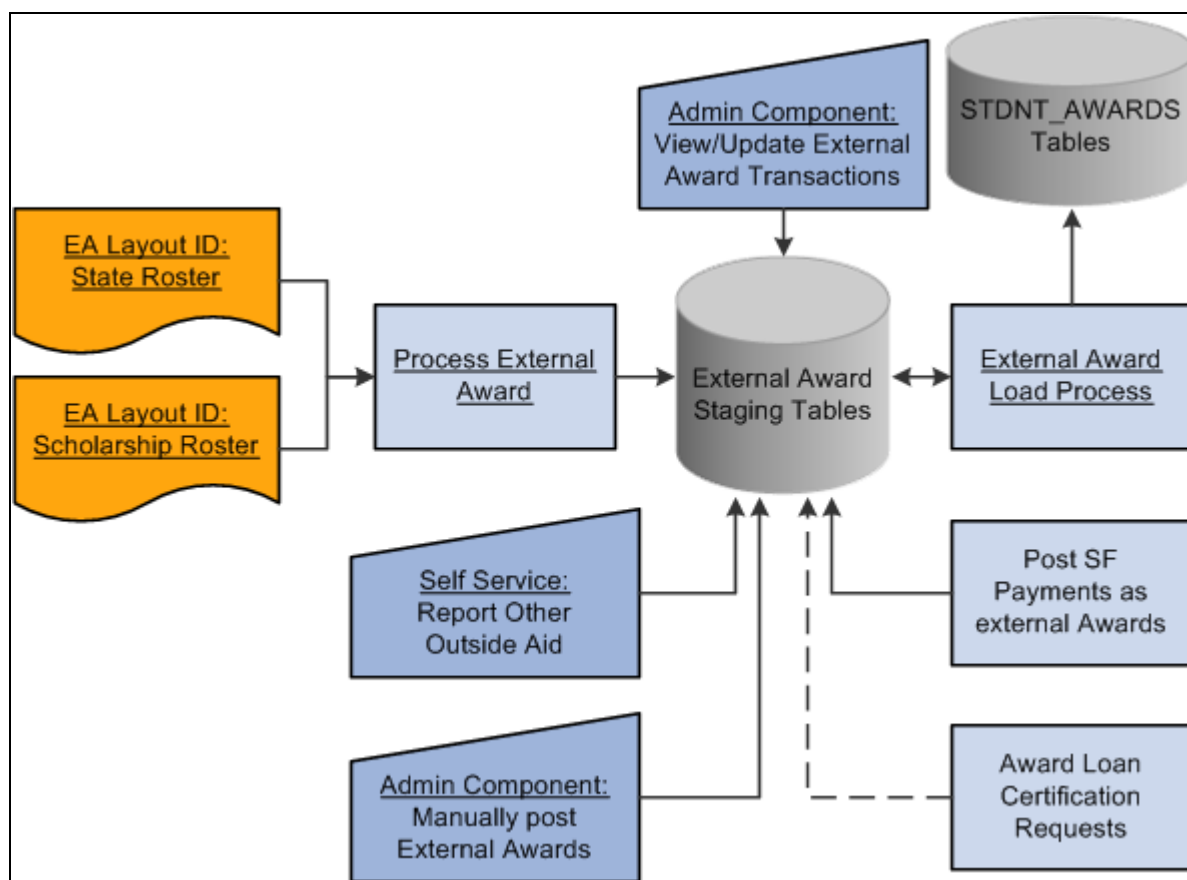
External award or resource data can be communicated to the financial aid office in various formats and methods:

- Data files, such as state grant roster files or internal departmental scholarship files.
- Manual data entry required when a student submits paper financial aid notifications that indicate outside or private scholarship awards.
- Entries from students who enter outside or private scholarships and grants in Self Service.
- Data included in other nonfinancial aid specific records, such as waiver and third-party contract payments already posted to a student's (SF) account.
- School Loan Certification Requests, which differ from all other external awards. The borrower applies for a loan directly with the servicer and the servicer requests that the school certify the borrower's eligibility.

External award data processing is built around a core set of External Award Staging records that maintain the external award transaction data. Every external award transaction entered is keyed with a set of transaction key values and provided a processing status as it relates to the loading of that transaction into the student award records.

Data Flow of External Awards to Student Award Tables

The following diagram shows a high-level flow of data.



Data flow of external awards to student award tables

Various data sources update the core set of External Award staging tables. After external award data or transactions update the staging tables, a separate External Award Load process is run to determine whether and how the external award data is to update the student award tables. The result of the External Award Load process updates the processing status field maintained for each external award transaction.

Special Consideration for Student Financial Payments

The Student Financial and Financial Aid teams need to determine which payments to represent on a student's award package. Then use the External Award process to acknowledge payments, waivers, and third-party credits that have already been posted to a student account. Payments posted to a student account can be defined as a one-to-one mapping to a (Financial Aid) item type or a many-to-one relationship.

To set up the mapping, complete the external award attribute setup outlined in this chapter. Then update the External Award tab on the (Student Financial) Item Type setup table. Run a separate SF External Award process to capture and assess mapped payments and credits to a financial aid item type. The SF External Award process creates external award transactions in the External Award Staging tables.

Awarding Loan Certifications as External Awards

The outcome of the External Award process updates award data in a student award package. A school loan certification request can become a candidate for a type of external award. The External Award process has options to identify the potential awarding of a loan certification request. School loan certifications are the only type of external award that is evaluated for federal need eligibility, based on the type of loan certification request.

Federal Stafford loan certification uses the Related Item Type setup to identify the subsidized and unsubsidized Stafford financial aid item types. The Stafford Loan Certification Awarding process evaluates the student's current federal need and posts the appropriate subsidized and unsubsidized award combination. If the student does not demonstrate need, the process returns an error message that the student is not eligible.

Parent Loan for Undergraduate Students (PLUS) and Alternative school loan certification requests require a single financial aid item type.

Note. Use this option only if your school incorporates the processing of school loan certification request applications in Commonline version 4 (CL4) or Common Record CommonLine (CRC.) Awarding loan certification requests as an external award accomplishes the awarding step within the loan certification process for CL4 or CRC.

Setting Up External Award Processing

This section discusses how to:

- Define external award types.
- Define external award sources.
- Cross-reference external award attributes to financial aid item types.


Pages Used to Set Up External Award Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Award Type	SFA_EA_TYPE	Set Up SACR, Product Related, Financial Aid, External Awards, Define External Award Types, External Award Type	Define external award types.
External Award Source	SFA_EA_SOURCE	Set Up SACR, Product Related, Financial Aid, External Awards, Define External Award Sources, External Award Source	Define external award sources.

Page Name	Definition Name	Navigation	Usage
External Award Cross Reference	SFA_EA_TYPE_XREF	Set Up SACR, Product Related, Financial Aid, External Awards, Item Type Cross Reference, External Award Cross Reference	Cross-reference external award attributes to financial aid item types. Use if a financial aid item type is not defined on an external award transaction. Use cross-reference setup to map Student Financial payments to a financial aid item type award.

Defining External Award Types

Access the External Award Type page (Set Up SACR, Product Related, Financial Aid, External Awards, Define External Award Types, External Award Type).

External Award Type				
Customize Find  First 1-8 of 8 Last				
*Award Type	*Description	Short Description		
GNT	Grant	Grant	+	-
LNS	Loan	Loan	+	-
OAD	Outside Aid	OAD	+	-
SCH	Scholarship	Scholarshp	+	-
STP	Employee Stipend	Employee S	+	-
TPC	Third Party Contract	TPC	+	-
WRK	Work Study Earnings	WS Earning	+	-
WVR	Waiver	Waiver	+	-

External Award Type page

The external award type is a high-level description of the type of external award to be processed. External award type is completely user-defined. Definitions help with categorizing and reporting external award data collected.

Defining External Award Sources

Access the External Award Source page (Set Up SACR, Product Related, Financial Aid, External Awards, Define External Award Sources, External Award Source).

External Award Source

Find | View All

First 1 of 6 Last

*External Award Source

AK

+ -

*Description

AK State Agency

*Short Description

AK State A

*Program Code	*Description	Short Description		
			+	-

External Award Source page

Use this page to define the sources of external awards, such as your state, other departments at your institution, your Human Resources department, Student Financials, or a general category of student-reported awards. A unique program code can be further defined within an external award source code. These attributes are completely user-defined. Use the definitions to categorize and report collected external award data.








































































































Cross-Referencing External Award Attributes to Financial Aid Item Types

Access the External Award Cross Reference page (Set Up SACR, Product Related, Financial Aid, External Awards, Item Type Cross Reference, External Award Cross Reference).

External Award Cross Reference

Academic Institution PSUNV PeopleSoft University

Aid Year 2006-2007

Customize Find  First 1-17 of 17 Last							
*Award Type	*Source	Program Code	*Item Type	Description	Self Service		
GNT 	AK 		900000000402 	AK State Actual	<input type="checkbox"/>		
GNT 	CA 	A 	900000000404 	CA Grant A	<input checked="" type="checkbox"/>		
GNT 	CA 	B 	900000000405 	CAL Grant B	<input checked="" type="checkbox"/>		
GNT 	CA 	C 	900000000406 	CAL Grant C	<input checked="" type="checkbox"/>		
GNT 	SF 		900000000473 	Departmental Awards	<input type="checkbox"/>		
LNS 	INT 		900000000500 	INSTITUTIONAL LOAN #1	<input type="checkbox"/>		
OAD 	STD 	443 	900000000443 	Other Scholarship	<input checked="" type="checkbox"/>		
OAD 	STD 	460 	900000000460 	Self Reported External Aid 1	<input checked="" type="checkbox"/>		
OAD 	STD 	461 	900000000461 	Self Reported External Aid 2	<input checked="" type="checkbox"/>		
SCH 	INT 		900000000441 	Technology Scholarship	<input checked="" type="checkbox"/>		
SCH 	INT 	FAO 	900000000442 	Outside Scholarship	<input type="checkbox"/>		
SCH 	INT 	GPA 	900000000440 	Performing Art Scholarship	<input checked="" type="checkbox"/>		
STP 	HR 	STP 	900000000410 	Employee Stipend	<input checked="" type="checkbox"/>		
TPC 	SF 	A 	900000000472 	TPC Army	<input type="checkbox"/>		
TPC 	SF 	B 	900000000473 	Departmental Awards	<input type="checkbox"/>		
WRK 	HR 	WS 	900000000200 	Federal Work-Study Program	<input type="checkbox"/>		
WVR 	SF 		900000000470 	Waiver	<input type="checkbox"/>		

External Award Cross Reference page

Use this page to map Type and Source values that you entered on the External Award Type page and the External Award Source page to an existing financial aid item type. You can map many external awards with similar attributes to the same financial aid item type. For example, a school can combine several outside scholarship programs in a single financial aid item type. The external award attributes may differ, but all map to the same financial aid item type.

Note. If mapping many to one financial aid item type, ensure that the reporting code is *Append*. This ensures that the financial aid item type award represents a comprehensive total.

The Student Financial External Awards process uses the cross-reference mapping and external award attributes mapped on the Student Financial item type setup to determine which (SF) payments to process and report as external award transactions.

Award Type

Select an award type that you entered on the External Award Type page.

Source	Select an award source that you entered on the External Award Source page.
Program Code	(Optional) Use depending on the granularity of detail that you need in order to map an external award to a financial aid item type. Select an award source program code that you entered on the External Award Source setup page.
Item Type	<p>Select the financial aid item type to associate with this row's type and source combination. Different combinations of external award attributes can be mapped to the same item type. For example, you could categorize several outside scholarships with their own combination of type, source, and program code. However, each combination would map to a single item type for award posting.</p> <hr/> <p>Note. If you are mapping several attribute combinations to a single item type, each external award transaction must have a reporting code of <i>Append</i> to ensure that the correct added amount is posted.</p> <hr/>
Self Service	<p>Select the check box for each row of information that should appear for the student on the Report Aid from Other Sources Self Service pages. In Self Service, students can then select the award type from a drop-down list box. If an award does not appear in a drop-down list box, the student can enter the award in free form.</p> <p>See <i>PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook</i>, "Setting Up Financial Aid Self-Service."</p>

Defining Search and Match Criteria

This section discusses how to define search and match criteria for the External Award Load process.

Page Used to Define Search and Match Criteria

Page Name	Definition Name	Navigation	Usage
External Award Search Match Rules	SFA_EA_SRCH_MATCH	Set Up SACR, Product Related, Financial Aid, External Awards, Search Match Rules, External Award Search/Match Rules	Define search and match criteria for use by the External Award Load process.

Defining Search and Match Criteria for the External Award Load Process


Access the External Award Search Match Rules page (Set Up SACR, Product Related, Financial Aid, External Awards, Search Match Rules, External Award Search/Match Rules).

External Award Search Match Rules

Institution PSUNV PeopleSoft University

Aid Year 2006-2007



File Mapping EXT FILE_EA DATA

Search Parameter  External Award Stage Rules

No Match Found

	Update	Suspend	Ignore
New	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Match(es) Found

[Find](#) First  1-4 of 4  Last

One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Order Nbr 10	NID,LNAME,FNAME,MNAME,DOB
<hr/>					
One Match:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Order Nbr 20	NID,LNAME,FNAME
<hr/>					
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Order Nbr 30	NID
<hr/>					
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Order Nbr 40	LNAME,FNAME

External Award Search Match Rules page

The External Award Stage process uses the Search/Match utility when running the External Load for an external file. You create your own search/match rules and search/match parameters for each File Mapping definition. The process determines whether an existing ID matches a transaction identified within an external award data file. Each external award data file must be related to a File Mapping definition defined within the File Parser utility.

The following table lists the search fields specific to External Award Stage processing that are relevant when you are defining search/match rules.

<i>External Award Stage Fields</i>	<i>Search Rule</i>	<i>Search Field</i>
National ID	NationalIDRule	NATIONAL_ID
Last Name	LastNameSrchRule	LAST_NAME_SRCH
First Name	FirstNameSrchRule	FIRST_NAME_SRCH
Date of Birth	DateOfBirthRule	BIRTHDATE

External Award Stage Fields	Search Rule	Search Field
Middle Name	MiddleNameRule	MIDDLE_NAME

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Search/Match."

No Match Found Select *Suspend* or *Ignore* as the action for the External Award Load process to take when no match is found.

Match(es) Found Starting from the lowest search order, select *Update*, *Suspend*, or *Ignore* as the action for the External Award Load process to take when a match is found. In this example, 10 is the lowest and most restrictive search rule.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Search/Match"

Planning for File Parser and External Award Processing

Use the File Parser utility to map external award data files and convert data to the External Award staging tables. The delivered External Award context definition defines the target External Award staging tables, fields, and mapping action. Use this section to determine how to create File Parser mapping definitions for external award processing.

This section discusses how to:

- Use the context definition.
- Use the file mapping definition.
- Review the External Award staging tables.

Using the Context Definition

The context definition identifies the target table that the File Parser populates with external data. A context definition identifies the hierarchy of the target record structure and fields available to be mapped and updated. Your Campus Solution database is provided with the context definition for the External Award process. The External Award context definition contains the External Award Stage records and fields, which are the target records for mapping any external data file for the External Award process. Do not change any record or fields defined in the External Award context definition unless you need to reduce the number of fields that are visible for mapping.

Using the File Mapping Definition

Use the File Mapping Definition component to map and define a data file to be converted to target staging tables. The key element in a File Mapping definition is the context definition to be referenced. After you identify the context definition, identify the external data file layout. The external fields are then mapped to the available target records and fields.

Use the File Definition tab to identify the context definition and general attributes of the data file to be processed. Use the External Award Load context definition for external files that contain data that you want to convert and update the external award staging tables. If your external file has multiple row types, then only identify the row types that have data that you want to convert.

Use the File Layout tab to identify the external file fields and format.

Use the Mapping tab to define how the target staging table and fields are updated when the external file is processed. For example, your external file probably contains a field comparable to the required SFA_EA_REPORT_CD field on the staging table record SFA_EASTAGE_DTL. On the Mapping tab for this field, set the Mapping Action field to *Default Value* and enter *A=Append*, *R=Replace*, or *N=New*. When the external file is processed, the SFA_EA_REPORT_CD field is then populated with that value.

Reviewing the External Award Staging Tables

The record layout and field definitions describe the External Award staging tables. The layout also identifies which fields are visible for mapping in the File Parser Mapping Definition component. The four records are:

- SFA_EASTAGE_HDR: The header record, which contains the highest keys.
- SFA_EASTAGE_DTL: The award details at an annual award level.
- SFA_EASTAGE_DSB: Award disbursement details.
- SFA_EASTAGE_CNT: Summary counter and amounts.

External Award Stage Header Record and Fields

This is the parent record to the SFA_EASTAGE_DTL and SFA_ESTAGE_DSB records.

<i>Field Name</i>	<i>Description</i>	<i>Visible for Mapping</i>	<i>Comment</i>
SFA_EA_TRANS_NBR	Transaction number		Key assigned by the system.
TRANSACTION_DATE	Transaction date		Assigned by the File Staging process.
PROCESS_INSTANCE	Process instance		
SFA_EA_TRANS_SRCE	Transaction source		Assigned by the system. 01 = Manual Entry, 02 = External Data file, 03 = Loan Certification file (not currently used), 04 = Student Financials Feed, 05 = Self Service.

Field Name	Description	Visible for Mapping	Comment
OPRID	User ID		Assigned by the File Staging process.
SCCFP_MAP_ID	File mapping ID		Assigned by the system.
FILENAME	File name		Assigned by the File Staging process.
CPS_SCHOOL_CODE	School code	Yes	Not currently used. Context Definition is Visible for Mapping.
SFA_EA_STDNT_COUNT	Transaction student count		Field exists on the SFA_EASTAGE_CNT record. If mapped, the field is used to capture source transaction student count.
SFA_EA_AWARD_TOTAL	Transaction award total		Field exists on the SFA_EASTAGE_CNT record. If mapped, the field is used to capture source transaction award total.
SFA_EA_RSLT_COUNT	Actual count		Number of row counts in SFA_EASTAGE_DTL when source is external file.
SFA_EA_RSLT_TOTAL	Actual total		Sum of awards in SFA_EASTAGE_DT, when source is external file.
SFA_EA_FILE_STATUS	File read status		Assigned by the File Staging process.
PKG_STATUS_CD	Packaging status		Error number. Assigned by File Staging process.

External Award Stage Detail Record and Fields

This is the child record to the SFA_EASTAGE_HDR record.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		Key assigned by the system
SFA_EA_SEQNO	Sequence number		Key assigned by the system
NATIONAL_ID	National ID	Yes	Available as a Search/Match element. If EMPLID is provided, the Search/Match routine is bypassed.
BIRTHDATE	Date of birth	Yes	Available as a Search/Match element. If EMPLID is provided, the Search/Match routine is bypassed.

Field Name	Description	Visible for Mapping	Comment
LAST_NAME	Last name	Yes	Available as a Search/Match element. If EMPLID is provided, the Search/Match routine is bypassed.
FIRST_NAME	First name	Yes	Available as a Search/Match element. If EMPLID is provided, the Search/Match routine is bypassed
MIDDLE_NAME	Middle name	Yes	Available as a Search/Match element. If EMPLID is provided, the Search/Match routine is bypassed.
EMPLID	Employee ID	Yes	If EMPLID is provided, then Search/Match parameters are bypassed during the External Award Load process.
INSTITUTION	Academic Institution		
AID_YEAR	Aid Year		
ACAD_CAREER	Academic Career	Yes	(Optional) The External Award Load process uses an active career, as determined from the FA Term record for the student ID. If the student has multiple careers within one aid year, the External Award Load process errors out with a message indicating that the student has more than one active career. If you are running the External Award Load process from batch, you can allow the External Award Load process to post an external award transaction to the first active career found.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_PROC_STAT	Processing Status		<p>The processing status of the External Award transaction:</p> <ul style="list-style-type: none"> • <i>Unprocessed</i>: All transactions start with this value except student-reported aid (Self Service). • <i>Processed</i>: Indicates a successful External Award Load. • <i>Error</i>: • <i>Adjusted</i>: Assigned as a result of Multi-Career batch option, Term Mismatch batch option, or a reduction by the Engine (in the case of a loan certification request). • <i>Duplicate</i>: Assigned during EA Load. If the reporting code is New and the student's award package already has Financial Aid Item Type posted, the External Award Load process returns Duplicate. The status can also be changed manually to Duplicate. • <i>Suspend</i>: Based on the Search/Match option. • <i>Skip</i>: Based on the Search/Match option, Multi-Career batch option, or Term Mismatch batch option. • <i>In Progress</i>: Assigned to transactions selection for a particular External Award Load process. Thus, if the program terminates during processing, batch transactions remain at this status. Change the value manually for the batch to be selected again by the External Award Load process. • <i>Reported</i>: Assigned to all new External Awards with data source of <i>Self Service</i>.
SFA_EA_PROC_DTTM	Date/Time Processed		
SFA_EA_EA_TYPE	External Award Type	Yes	(Optional) If no financial aid item type is provided, then external award attributes of Type, Source, or Program code are reviewed against External Award Cross-Reference item type setup.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_SOURCE	External Award Source	Yes	(Optional) If no financial aid item type is provided, then external award attributes of Type, Source, or Program code are reviewed against External Award Cross-Reference item Type setup.
SFA_EA_PROGRAM_CD	External Award Program Code	Yes	(Optional)
SFA_EA_LOAN_CERT	Loan Certification	Yes	(Optional) Indicates external award data is based on a Loan Certification Request. If yes, then a corresponding Related Item Type Group or Item Type value must be identified. If yes, Reporting Code becomes New by default. See Chapter 7, "Setting Up External Awards," Awarding Loan Certifications as External Awards, page 206.
SFA_EA_REPORT_CD	Reporting Code	Yes	(Required) Determines how transaction data is posted to a student's award package: <ul style="list-style-type: none"> <i>New:</i> If item type to be posted already exists, the External Award Load process sets the transaction to Error. This is used ideally for external awards reported once each aid year. <i>Replace:</i> The default value when you are entering transactions manually. Use this value to change existing annual and disbursement details of an award. If item type to be posted does not already exist, the External Award Load process treats transaction as if Reporting Code value were <i>New</i>. Be careful when using the Replace value and providing only term amount details. See NET_AWARD_AMT field to understand how field amount is determined. <i>Append:</i> Use this value to add an amount to an existing award. Append transactions can increase the annual award amounts for specific disbursement IDs. If item type to be posted does not already exist, the External Award Load process treats the transaction as if Reporting Code is <i>New</i>.
ITEM_TYPE	Item Type	Yes	If this field is blank, the External Award Load process uses the External Award Item Type Cross Reference setup to determine the item type to be added or updated.

Field Name	Description	Visible for Mapping	Comment
REL_ITEM_TYPE	Related Item Group	Yes	Available only when Loan Certification equals Yes. This value is intended to determine Stafford eligibility. The Related Item Type group should identify both Subsidized and Unsubsidized Stafford item types. See Chapter 7, "Setting Up External Awards," Awarding Loan Certifications as External Awards, page 206.
DESCR	Description	Yes	(Optional) Enter a 30-character award description. The description is displayed in Self Service.
DISBURSEMENT_PLAN	Disbursement Plan	Yes	(Optional) If provided, the disbursement plan (DP) is used. If the disbursement plan is not provided, the default DP from the item type's career default DP/Split Code (SC) is used. If no default DP/SC is defined for career, a DP/SC is used from the student's term enrollment. If a DP/SC is not found, External Award Load errors out the transaction. For Replace/Append transactions, this must be the same value used on the posted (noncanceled) award. A Split code does not need to be provided if a Disbursement Plan code exists. Providing only a Disbursement Plan code allows the External Award Load process to establish the term disbursement structure and define the specific distribution based on amounts provided in transaction.
SPLIT_CODE	Split Code	Yes	(Optional) If provided, this split code is used to determine the disbursement split formula. Split code is set to XX if disbursement data is provided on the External Award transaction.
NET_AWARD_AMT	Net Award Amount	Yes	(Optional) The annual amount to be posted. If scheduled disbursement amounts are provided, the cumulative scheduled disbursement amounts must equal the net award amount. If this field is blank, and scheduled disbursement detail is provided, then the net award amount is assigned the sum of scheduled disbursement amounts.

Field Name	Description	Visible for Mapping	Comment
DISBURSED_AMOUNT	Disbursed Amount	Yes	<p>(Optional) The total disbursed amount to be posted. If disbursement detail amounts are provided, the cumulative amounts must equal the disbursed amount. If this field is blank and disbursement detail is provided, then disbursed amount is assigned the sum of the disbursement detail amounts.</p> <p>Note. The disbursed amount on the posted award is updated only when the disburse method for the item type is <i>No</i>.</p>
SFA_EA_PAY_STATUS	Paid Status	Yes	<p>(Optional) Indicates that the annual amount has been fully paid to the student. If you select <i>Yes</i>, the annual disbursed amount is equal to the net award amount.</p> <p>Note. The disbursed amount on the posted award is updated only when the Disburse method for the item type is <i>No</i>.</p>
SFA_EA_ADJ_REASON	Adjustment Reason	Yes	(Optional) Use this 3-character field to capture additional information. Any data mapped to this field is visible when you are viewing external award transaction data.
SFA_EA_INELIGIBLE	Ineligibility Reason Code	Yes	(Optional) Use this 3-character field to capture additional information. Any data mapped to this field is visible when you are viewing external award transaction data.
SFA_EA_SUSPEND_RSN	Suspense Reason		1-character suspense code. Currently not being used.
SFA_EA_LOAD_ERROR	Load Error Code		External Award Load Error Message codes are maintained in the Message Catalog/Message Set Number = 14402/Message Set range 600s.
SFA_EA_SS_VISIBLE	Self Service Visible Code		Yes/No. This field is available on the Award Detail component for each external award transaction. Select <i>Yes</i> to show the DESCRLONG value as award detail in Self Service.
FIN_AID_TYPE	Financial Aid Type		Used by External Award Load process to evaluate award posting.

Field Name	Description	Visible for Mapping	Comment
DESCRLONG	Description		Used with the SFA_EA_SS_VISIBLE field. If the Visible field is selected, descriptions entered are available for the student to view in Self Service, Reporting Outside Aid-Award Details.

External Award Stage Disbursement Record and Fields

This is the child record to the SFA_EASTAGE_DTL record.

Field	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		A key assigned by the system.
SFA_EA_SEQNO	Sequence number		A key assigned by the system.
SFA_EA_DISB_SEQNO	Disbursement Sequence	Yes.	(Required) A key assigned by system. It represents each unique disbursement detail for the transaction. If you map several disbursement detail rows from an external file, when you define the mapping, set Mapping Action to become a 2-digit numeric value by default. This ensures that the key is created when the external file is processed.
STRM	Term	Yes	(Optional) If provided, the External Award Load process determines whether it is valid with the student's enrollment. If a disbursement ID is not provided, then the first disbursement ID for STRM is updated.
DISBURSEMENT_ID	Disbursement ID	Yes	(Optional) Use to append the disbursement amount to an existing award.
SCHEDULED_AWARD	Scheduled Award	Yes	The scheduled or allocated disbursement amount at the disbursement sequence level.
DISBURSED_AMOUNT	Disbursed Amount	Yes	The disbursed or paid amount at the disbursement sequence level. Note. The disbursed amount on the posted award is updated only when the Disburse method for the item type is <i>No</i> .

Field	Description	Visible for Mapping	Comment
SFA_EA_PAY_STATUS	Paid Status	Yes	<p>(Optional) Identify the paid status at the disbursement sequence level. If you select <i>Yes</i>, the disbursement sequence amount is equal to the resulting scheduled award amount.</p> <p>Note. The disbursed amount on the posted award is updated only when the Disburse method for the item type is <i>No</i>.</p>

External Award Stage Counter Record and Fields

This is the child record to the SFA_EASTAGE_HDR record.

Field Name	Description	Visible for Mapping	Comment
SFA_EA_TRANS_NBR	Transaction number		A key assigned by the system.
SFA_EA_STDNT_COUNT		Yes	If mapped, this field is used to capture source transaction student count, but no processing logic is associated with the field.
SFA_EA_AWARD_TOTAL		Yes	If mapped, this field is used to capture source transaction award total, but no processing logic is associated with the field.

Chapter 8

Setting Up Auto Packaging and Mass Packaging

This chapter provides an overview of Auto Packaging and Mass Packaging and discusses how to:

- Use Equation Engine in packaging.
- View and edit equations.
- Review equations.
- Review equation examples.
- Create equity item type groups.
- Create related item type groups.
- Define packaging plans.

Understanding Auto Packaging and Mass Packaging

The items covered in this chapter are required only for Auto Packaging or Mass Packaging. You must also perform the basic setup tasks outlined in the general awarding setup chapter.

This section lists prerequisites and provides an overview of packaging plans.

See Also

Chapter 5, "Setting Up Packaging Basics," page 75

Prerequisites

Before setting up your packaging plans, perform the following steps to define your institution's needs:

1. Define the populations of students who may have unique needs and for what awards they are eligible.

Your student populations might include undergraduate students, graduate students, and medical students. Within your graduate population you might have students in a teacher credential program, masters level students, and Ph.D. level students. Within your undergraduate and graduate populations you might group students by their academic program or plan, such as sociology or physical education. Medical students might be grouped by their year in the program, for example first year or fourth year. For reasons of equity, especially if your institution cannot meet all students' financial need, you may want to group students by their financial need, as determined by subtracting Expected Family Contribution (EFC) from cost of attendance (COA). In that case, you may have a population defined as undergraduate students with need greater than 10,000.00 USD and another group defined as undergraduates with a need less than 10,000.00 USD.

2. Determine which awards students in each group are eligible for or which awards you want to give certain students, and in which order these awards should be offered.

Each financial aid award that your institution offers may apply to all students or to only a specific group of students. For example, only undergraduates are eligible for Pell Grants and only students from California are eligible for Cal Grants, but you might have a University Grant for which all students are eligible regardless of their career or residency. You are now ready to start grouping awards together into a packaging plan.

Understanding Packaging Plans

Using Financial Aid, you can create packaging plans that give the system instructions on how to award or package a student with various financial aid awards. You should create your packaging plans to meet the needs of your various groups of students. Packaging plans are used when groups of students are packaged in a background process (Mass Packaging) or when the system automatically packages an individual student online (Auto Packaging). A packaging plan groups together financial aid awards and enables you to set specific rules for how that group of awards should be given to students. You can also specify other important parameters in a packaging plan, such as how much federal need the packaging plan meets and how the aid is disbursed to students. The packaging plan can incorporate nearly all decisions that a financial aid counselor makes when creating a financial aid package with specific financial aid awards. Because a packaging plan is set up to make decisions that a financial aid counselor would, the packaging plans must reflect your institution's financial aid awarding philosophy so that the automated process works most effectively for you.

If you have a group of similar awards, such as endowed restricted funds, which have very specific target populations, you might want to group these awards together into a related item type group. You can define the group and include it in a packaging plan as an individual award, instead of adding individual restricted aid financial aid item types to packaging plans.

Individual financial aid item types can be part of as many packaging plans as you prefer. Some financial aid item types can be in every packaging plan, such as an unsubsidized Stafford loan.

Not all financial aid item types in a packaging plan are issued to all students who are selected for that packaging plan. The packaging plan assigns financial aid item types to students based on selection criteria defined for each financial aid item type and the overall packaging rules set up as part of the packaging plan. For example, a packaging plan includes ten different financial aid item types, but a student receives only five of the ten financial aid item types because of eligibility requirements or because the student's financial need is met. Although you are not packaging students in this section, it is important to know how packaging plans are used to set them up effectively.

After you group your individual financial aid item types in your various packaging plans, decide in what order you want the various awards to be made. This decision depends heavily on your institution's financial aid packaging policies. The automated Packaging routines process individual financial aid item types in a designated order within each packaging plan. The automated Packaging routine continues awarding up to a dollar limit or a percentage of need defined in the packaging plan, or up to the cost of attendance, depending on the type of awards that are included in the packaging plan. Because awards are packaged in a specific order up to the defined limit, you may want to sequence entitlement awards near the top of the packaging plan to ensure that they are awarded. You might want to put less desirable awards, such as unsubsidized loans, lower in the order.

In addition to selecting and sequencing awards in the packaging plan, you must set up several other parameters. Define packaging targets, award limits, equity limits, loan award limits, work award limits, and the disbursement schedule for each award. For award-related limits and disbursements, you can use the default value for the award—as defined in your financial aid item type setup—or you can define values to be used for the award when it is included in a packaging plan.

Throughout the setup of your packaging plans you can use equations to identify a population of students or to perform calculations. Use the Equation Engine to create these equations.

Using Equation Engine in Packaging

Equation Engine can read any table for which you have security access and can perform various arithmetic operations and external call subroutines.

Note. If you plan to use equations, you must set them up before you set up packaging plans. Similarly, if you plan to use Mass Packaging, set up equations to be used as part of that process.

You must be familiar with the fields that you can use in equations to understand what student data is available for selection or calculation. Equations are written in statements similar to spoken phrases. For example, if you want to write an equation that calculates different award amounts based on a student's grade level, using the Global A_AMOUNT option, you would first write:

If the student's grade level is freshman, then I want to award 8,000.00 USD; if the student's grade level is sophomore, then I want to award 8,500.00 USD; if the student's grade level is junior, then I want to award 9,000.00 USD, and if the student's grade level is a senior or higher, then I want to award 9,500.00 USD.

This sentence can be written as an equation:

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
1	SKIP			
2	ASSIGN	Local	AWARD_PERIOD	
3		String	A	
4	END ASSIGN			
5	FIND FIRST	Global	FOUND_FAN_AWD _PER_VW	

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
6		Table	FAN_AWD_PER_V W	
7		Global EQ	EMPLID	
8		Global EQ	INSTITUTION	
9		Global EQ	AID_YEAR	
10		Local EQ	AWARD_PERIOD	
11	END FIND			
12	IF			
13		Table	FAN_FA_TERM_V W	
14		Field	NSLDS_LOAN_YE AR	
15	<=			
16		Value	1	
17	THEN			
18	ASSIGN	Global	A_AMOUNT	
19		Number	8000.00000	
20	END ASSIGN			
21	ELSE IF			
22		Table	FAN_FA_TERM_V W	
23		Field	NSLDS_LOAN_YE AR	
24	=			
25		Value	2	
26	THEN			
27	ASSIGN	Global	A_AMOUNT	

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
28		Number	8500.00000	
29	END ASSIGN			
30	ELSE IF			
31		Table	FAN_FA_TERM_V W	
32		Field	NSLDS_LOAN_YE AR	
33	=			
34		Value	3	
35	THEN			
36	ASSIGN	Global	A_AMOUNT	
37		Number	9000.00000	
38	END ASSIGN			
39	ELSE IF			
40		Table	FAN_FA_TERM_V W	
41		Field	NSLDS_LOAN_YE AR	
42	>=			
43		Value	4	
44	THEN			
45	ASSIGN	Global	A_AMOUNT	
46		Number	9500.00000	
47	END ASSIGN			
48	END IF			

FAPDGRADEVL

In the example, `NSLDS_LOAN_YEAR` is the field name for academic level. The first section of the equation assigns the global variables needed by the equation engine to identify the proper `NSLDS_LOAN_YEAR`. The second section tells the system which table, field, and field values are to be evaluated by the equation (`NSLDS_LOAN_YEAR` value = freshman, sophomore, junior, and so on). Based on the table/field value, the 'Assign Global A_AMOUNT' statement instructs the system to award the student a particular dollar value (if the student is a sophomore, award the student 8,500.00). When using the Equation Engine, you are guided in the writing of your equation by the various field prompts and their values.

As another example, if you are creating a packaging plan for your graduate career and you need to select all students with a graduate career, you would write an equation using `A_SELECT`: I want to select all of my students whose career equals graduate.

This sentence can be written as an equation:

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
1	ASSIGN	Global	STRM	
2		String		
3	END ASSIGN			
4	FIND FIRST	Global	FOUND_FAN_FA_TERM_VW	
5		Table	FAN_FA_TERM_VW	
6		Global EQ	EMPLID	
7		Global EQ	INSTITUTION	
8		Global GE	STRM	
9	END IF			
10	IF			
11		Table	FAN_FA_TERM_VW	
12		Field	ACAD_CAREER	
13	=			
14		String	GRAD	
15	THEN			
16	ASSIGN	Global	A_SELECT	
17		String	GRAD	

Line Number	Equation Keyword	Operand Type	Operand	Comment
18	END ASSIGN			
19	ELSE			
20	ASSIGN	Global	A_SELECT	
21		String	F	
22	END ASSIGN			
23	END IF			

FAPDGRADS

In the example, ACAD_CAREER is the field name for career. The first section of the equation assigns the global variables needed by the equation engine to identify the proper Career. The second section tells the system which table, field, and field values are to be evaluated by the equation (ACAD_CAREER = GRAD). Based on the table/field value, the 'Assign Global A_SELECT' statement instructs the system to select the student, in this example, for the particular packaging plan (if the student's career equals GRAD, assign the student to 'Graduate' packaging plan).

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Working with Equation Engine"

Viewing and Editing Equations

This section provides an overview of the Equation Engine and discusses how to:

- Review field names for equations.
- Use packaging data source and equation engine.
- Round in packaging using equations.

Understanding the Equation Engine

The Equation Engine is a very powerful tool that enables you to develop a variety of formulas. The equations are used to select a specific population of students for packaging as well as to calculate award amounts and other numeric values. The Equation Engine uses algebraic equations and Boolean formulas, and it enables you to link equations. Equations are used when defining a packaging plan, setting award maximums and limits, and assigning groups of students to a financial aid item type, equity group, or related item type group.

Before you write an equation, define the information that you want the equation to provide. If you want the equation to provide a listing for a group of students, decide exactly what the process for selecting those students is and then create an equation using the global statement 'ASSIGN GLOBAL A_SELECT' = T' structure. You need to assign this kind of equation as 'Fin Aid Packaging Select Eqtns' for its application prompt. By doing this, you are presented with only Selection Type Equations in Packaging Setup. If you want the equation to provide a calculated value such as an award maximum, decide where the value is derived from and how it is calculated and then create an equation using the Global statement 'ASSIGN GLOBAL A_AMOUNT Number #####.##' structure. You need to assign this kind of equation as 'Fin Aid Packaging Amount Eqtns' for its application prompt. By doing this, you are presented with only Calculation Type Equations in Packaging Setup.

Page Used to View and Edit Equations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equation Editor	EQUATION_EDITOR	Set Up SACR, Common Definitions, Equation Engine, Equation Editor	View and edit equations.

Reviewing Field Names for Equations

Any field in the database can be accessed and used in developing equations if you have defined the table or view in Equation Data Tables (Set Up SACR, Common Definitions, Equation Engine, Equation Data Tables) and the relevant Equation Tree Security has been granted to the table or view (Set Up SACR, Security, Equation Tree Security, Tables and Views).

Some delivered packaging equations are system-specific and some are demonstration-specific. System-specific packaging equations contain the prefix FAPK* while demonstration-specific packaging equations contain the prefix FAPD*.

FAPK = Packaging System Equations. Do not modify any equation with the FAPK* prefix as these equations are used as part of the internal Equation processing of Dual Sourced fields (ISIR vs. IM fields) for Financial Aid Auto and Mass Packaging.

FAPD = Packaging Data Equations are a sample set equations provided as part of the demo database. These equations serve as examples of creating various types of packaging equations supported by the Equation Engine routine.

See Also

Equation Engine Programmer's Guide, PDF distributed with the PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook

Using Packaging Data Source and Equation Engine

The Equation Engine is equipped to handle dual-sourced fields for packaging purposes—same or similar fields that are sourced from the ISIR or an institutional application (PROFILE, Need Access, or institutional application) that packaging uses. The Equation Engine determines which source data to use.

Equations with the prefix FAPK* are system equations that handle the dual-sourced nature of these ISIR or institutional fields. To use these equations, you must create a new equation and invoke a CALL statement to the applicable FAPK system equations and then assign a global variable in your newly created equation. The system uses the Packaging Data Source together with these FAPK system equations fields to return the corresponding value from the appropriate Packaging Data Source. Review the delivered FAPD* equations to see how the corresponding FAPK equations are implemented.

Note. To ensure that the dual-sourced equations behave correctly, do not modify them.

Access the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

Equation Editor

Equation Name

FAPDDECREASE

Equation Table

Find | View All

First 1 of 1 Last

'Eff Date

01/01/1900

☒ Active

☐ Enable Preview Results

Short Desc

DECREASE

'Descr

RPKG: DECREASE

Compile Status

Successfully Parsed

Equation Edit Function

Equation Detail

Find | View All

First 1-18 of 23 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	If			
<input type="checkbox"/>	2		Table	FAN_AWD_PER_VW	
<input type="checkbox"/>	3		Field	FED_OVRAWD_AMT	
<input type="checkbox"/>	4	>			
<input type="checkbox"/>	5		Number	0.00000	
<input type="checkbox"/>	6	Then			
<input type="checkbox"/>	7	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	8		String	T	
<input type="checkbox"/>	9	End Assign			
<input type="checkbox"/>	10	Else If			
<input type="checkbox"/>	11		Table	FAN_AWD_PER_VW	
<input type="checkbox"/>	12		Field	FED_OVRAWD_COA	
<input type="checkbox"/>	13	>			
<input type="checkbox"/>	14		Number	0.00000	
<input type="checkbox"/>	15	Then			
<input type="checkbox"/>	16	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	17		String	T	
<input type="checkbox"/>	18	End Assign			

Application Prompts

Customize | Find | View All

First 1 of 1 Last

*Application Prompt ID	
1	Fin Aid Packaging Select Eqtns

Parameters

Customize | Find | View All

First 1 of 1 Last

Global	Type	Description
1		

Equation Editor page

The Equation Table group box displays the equation description and creation information. Use the Equation Detail group box to view and edit an approximate algebraic representation of the equation. Use the scroll bar to view the entire equation.

Equations use dual source fields. Refer to the following table for more details.

Packaging equations with dual source fields:

Packaging Equations with Dual Source Fields

Equation Name	Description	Field Name 1	RecName	Field Name 2
FAPKAFDCPAR	Set global AFDC_PAR	AFDC_PAR	*DUALSOURCE*	AFDC_PAR
FAPKAFDCSTU	Set glob AFDC_STU	AFDC_STU	*DUALSOURCE*	AFDC_STU
FAPKAGIPAR	Set global AGI_PAR	AGI_PAR	*DUALSOURCE*	AGI
FAPKAGISTU	Set global AGI_STU	AGI_STU	*DUALSOURCE*	AGI
FAPKCHLSPPAR	Set global CHILD_SUPPORT_PAR	CHILD_SUPPORT_PAR	*DUALSOURCE*	CHILD_SUPPORT
FAPKDEPDNTS	Set global DEPENDENTS	DEPENDENTS	*DUALSOURCE*	DEPENDENTS
FAPKDEPENDST	Set global DEPNDNCY_STAT	DEPNDNCY_STAT	*DUALSOURCE*	DEPNDNCY_STAT
FAPKDTAPPREC	Set global DT_APP_RECEIVE D	DT_APP_RECEIVE D	*DUALSOURCE*	DT_APP_RECEIVE D
FAPKERNINPAR	Set global ERND_INC_CRED_PAR	ERND_INC_CRED_PAR	*DUALSOURCE*	ERND_INC_CRED_PAR
FAPKEXEMPT	Set global NUM_EXEMPTION S	NUM_EXEMPTION S	*DUALSOURCE*	NUMBER EXEMPTIONS
FAPKEXEMPTPR	Set global NUM_EXEMPTION S_PAR	NUM_EXEMPTION S	*DUALSOURCE*	NUMBER_EXEMPTIONS
FAPKLEGALRES	Set global LEGAL_RESIDENCE	LEGAL_RESIDENCE	*DUALSOURCE*	LEGAL_RESIDENCE
FAPKMAR_STAT	Set global MARITAL_STAT	MARITAL_STAT	*DUALSOURCE*	MARITAL_STAT
FAPKMARSTPAR	Set global MARITAL_STAT_PAR	MARITAL_STAT_PAR	*DUALSOURCE*	MARITAL_STAT
FAPKMONVETBN	Set global MONTHLY_VET_BEN	MONTHLY_VET_BEN	*DUALSOURCE*	MONTHLY_VET_BEN

Equation Name	Description	Field Name 1	RecName	Field Name 2
FAPKNMINCOLL	Set global NUMBER_IN_COL LEGE	NUMBER_IN_COL LEGE	*DUALSOURCE*	NUMBER_IN_COL LEGE
FAPKNUMINFAM	Set global NUM_FAMILY_ME MBERS	NUMBER_IN_FAMI LY	*DUALSOURCE*	NUMBER_IN_FAMI LY
FAPKNMFAMMEM	Set global NUM_FAMILY_ME MBERS	NUM_FAMILY_ME MBERS	*DUALSOURCE*	NUM_FAMILY_ME MBERS
FAPKNUMINCOL	Set global NUMBER_IN_COL LEGE	NUM_IN_COLLEG E	*DUALSOURCE*	NUM_IN_COLLEG E
FAPKNMMNVTBN	Set global NUM_MONTH_VE T_BEN	NUM_MONTH_VE T_BEN	*DUALSOURCE*	NUM_MONTH_VE T_BEN
FAPKORPHAN	Set global ORPHAN	ORPHAN	*DUALSOURCE*	ORPHAN
FAPKSPERNINC	Set global SPS_EARNED_INC OME	SPS_EARNED_INC OME	*DUALSOURCE*	SPS_EARNED_INC OME
FAPKSSBENPAR	Set global SS_BENEFIT_PAR	SS_BENEFIT_PAR	*DUALSOURCE*	SOC_SEC_BENEFI TS
FAPKSSBENSTU	Set global SS_BENEFIT_STU	SS_BENEFIT_STU	*DUALSOURCE*	SOC_SEC_BENEFI TS
FAPKSTATERES	Get State Residence	STATE_RESIDENC E	*DUALSOURCE*	STATE_RESIDENC E
FAPKSTERNINC	Set global STD_EARNED_INC OME	STD_EARNED_INC OME	*DUALSOURCE*	STD_EARNED_INC OME
FAPKTOTWKAP	Set global TOTAL_FROM_WK A_P	TOTAL_FROM_WK A_P	*DUALSOURCE*	TOTAL_FROM_WK A_P
FAPKUNTAXIN	Set global UNTAXED_INC	UNTAXED_INC	*DUALSOURCE*	UNTAXED_INCOM E
FAPKUNTAXINP	Set global UNTAXED_INC_PA R	UNTAXED_INC_PA R	*DUALSOURCE*	UNTAXED_INCOM E
FAPKVETERAN	Set global VETERAN	VETERAN	*DUALSOURCE*	VETERAN

Packaging Data Source Control Equations

The following equations are key equations that the Equation Engine uses as internal triggers in its routine when determining what table to call to obtain correct data:

Warning! Do not modify or remove these equations.

Equation Name	Description
FAPKGDATASRC	Get Packaging Data Source
FAPKRDINSTCT	Read INST_CONTROL
FAPKRDINSTIN	Read INST_INTERPRET
FAPKRDINSTPR	Read INST_PARENT
FAPKRDINSTST	Read INST_STUDENT
FAPKRDISIRCT	Read ISIR_CONTROL
FAPKRDISIRPR	Read ISIR_PARENT
FAPKRDISIRST	Read ISIR_STUDENT

Rounding in Packaging Using Equations

The Packaging routine does not round up to whole dollar amounts when your equation yields a decimal result for a packaging limit. If the result contains decimals, the Packaging routine produces the following error message: *Message # 9146 Cannot disburse in whole dollars; award contains cents.*

For equations that need to yield a whole dollar result, you must use a rounding equation. Use one of two options:

- Option 1:
 1. Create your A_AMOUNT equation, and at the bottom of the equation, insert a Call statement to the delivered sample equation FAPDROUNDAWD.
 2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so on).
 3. Ensure that the Packaging System Equation EQROUND is called as part of FAPDROUNDAWD.

- Option 2:
 1. Create your A_AMOUNT equation, and at the bottom of the equation, append the contents of the delivered sample equation FAPDROUNDAWD to your newly created equation—making sure that you Assign ROUND_IN, ROUND_PLACES (including the number of places beyond the decimal point that you want A_AMOUNT to contain), and ROUND_RESULT.
 2. Ensure that the Packaging System Equation EQROUND is called as part of your newly created equation.

Note. For this rounding logic to work properly, it is imperative that all elements of FAPDROUNDAWD are employed and that EQROUND is called as part of that routine—these components should not be modified by you or anyone on your staff.

Here is an example of the Equation Editor page, showing the FAPDROUNDAWD equation:

Equation Editor

Equation Name FAPDROUNDAWD

Equation Table Find | View All First 1 of 1 Last

'Eff Date 01/01/1900 ☐ Active ☐ Enable Preview Results

Short Desc Round Awd 'Desc Round A_AMOUNT

Compile Status Not Yet Compiled

Equation Edit Function

Equation Detail Find | View All First 1-15 of 15 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			
<input type="checkbox"/>	2	Assign	Local Variable	ROUND_IN	
<input type="checkbox"/>	3		Global Variable	A_AMOUNT	
<input type="checkbox"/>	4	End Assign			
<input type="checkbox"/>	5	Assign	Local Variable	ROUND_PLACES	
<input type="checkbox"/>	6		Number	0.00000	
<input type="checkbox"/>	7	End Assign			
<input type="checkbox"/>	8	Call	Equation	EQROUND	
<input type="checkbox"/>	9	Call Parns			
<input type="checkbox"/>	10		Local Variable	ROUND_IN	
<input type="checkbox"/>	11		Local Variable	ROUND_PLACES	
<input type="checkbox"/>	12	End Call Parns			
<input type="checkbox"/>	13	Assign	Global Variable	A_AMOUNT	
<input type="checkbox"/>	14		Global Variable	ROUND_RESULT	
<input type="checkbox"/>	15	End Assign			

Example Equation Editor page

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Working with Equation Engine"

Reviewing Equations

This section discusses how to view equations as algebraic expressions.

Page Used to Review Equations

Page Name	Definition Name	Navigation	Usage
Review Equations	SCC_EQUATION_VIEW	<ul style="list-style-type: none">Set Up SACR, Common Definitions, Equation Engine, Review EquationsClick Equation Detail on the Related Item Type Group page, Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page.	View equation as algebraic expressions.

Viewing Equations as Algebraic Expressions

Access the Review Equations page (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

```

- <EQUATION>
  <EQUATIONNAME>FAPDDECREASE</EQUATIONNAME>
- <IF>
  <TABLE>FAN_AWD_PER_VW</TABLE>
  <FIELD>FED_OVRAWD_AMT</FIELD>
  > 0
  <THEN />
- <ASSIGN>
  <GLOBAL>A_SELECT</GLOBAL>
  <STRING>T</STRING>
</ASSIGN>
<ELSEIF />
<TABLE>FAN_AWD_PER_VW</TABLE>
<FIELD>FED_OVRAWD_COA</FIELD>
> 0
<THEN />
- <ASSIGN>
  <GLOBAL>A_SELECT</GLOBAL>
  <STRING>T</STRING>
</ASSIGN>
<ELSE />
- <ASSIGN>
  <GLOBAL>A_SELECT</GLOBAL>
  <STRING>F</STRING>
</ASSIGN>
</IF>
</EQUATION>

```

Review Equations page

This page displays the equation name and an approximate algebraic representation of the equation. You cannot edit the equation on this page. Use the scroll bar to view the entire equation.

Note. This summary is a representation of the equation that you created on the Equation Editor page. The Equation Editor page determines how your equation functions.

Reviewing Equation Examples

This section contains examples of equations. It details three equations that are used to create loan validation edits for financial aid. These equations are delivered with the system as part of the Loan Validation process. This section discusses these equations:

- Packaging selection.
- Packaging calculation
- Verifying student is enrolled.

Packaging Selection Equation

Sample Packaging Selection Equation resulting in a ASSIGN GLOBAL A_SELECT = True or False result. This equation provides an answer to the question *Is a student an undergraduate?* (FAPDUGRADS, Verify Student is an Undergrad):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Global	ACAD_CAREER	
3	=			
4		String	UGRAD	
5	THEN			
6	ASSIGN	Global	A_SELECT	
7		String	T	
8	END ASSIGN			
9	ELSE			
10	ASSIGN	Global	A_SELECT	
11		String	F	
12	END ASSIGN			
13	END IF			

Packaging Calculation Equation

Sample Packaging Calculation Equation resulting in a ASSIGN GLOBAL A_AMOUNT = numeric value result. This equation provides an amount *Set the award amount for an early admission student* (FAPDEARLYADM, Set early admission amount):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	SKIP			
2	IF			
3	NOT			

Line Number	Equation Keyword	Operand Type	Operand	Comment
4	EXISTS	Global	FOUND_FAN_ISIR_ STD_VW	
5	THEN			
6	FIND FIRST	Global	FOUND_FAN_ISIR_ STD_VW	
7		Table	FAN_ISIR_STD_V W	
8		Global EQ	EMPLID	
9		Global EQ	INSTITUTION	
10		Global EQ	AID_YEAR	
11	END FIND			
12	END IF			
13	IF			
14		Table	FAN_ISIR_STD_V W	
15		Field	EARLY_ADMISSION	
16	=			
17		Value	1	
18	THEN			
19	ASSIGN	Global	A_AMOUNT	
20		Number	2500.00000	
21	END ASSIGN			
22	ELSE			
23	ASSIGN	Global	A_AMOUNT	
24		Number	1250.00000	
25	END ASSIGN			

Line Number	Equation Keyword	Operand Type	Operand	Comment
26	END IF			

Verifying Student Is Enrolled Equation

This equation provides an answer to the question *Is a student enrolled* (U_FA_LOAD, Verify Student is Enrolled):

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Table	STDNT_AID_ATTRB T	
3		Field	AID_APP_STATUS	
4	<>			
5		Prompted Value	C	C = Cancelled
6	THEN			
7	IF			
8		Table	U_FA_TERM_VW	
9		Field	TERM_SRC	
10	<>			
11		Prompted Value	T	T = Term
12	THEN			
13	ASSIGN	Global Variable	RESULT	
14		String	FAILED	
15	END ASSIGN			
16	ASSIGN	Global Variable	HR_MSG_SET_NB R	
17		String	21100	
18	END ASSIGN			

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
19	ASSIGN	Global Variable	HR_MSG_NBR	
20		String	00005	
21	END ASSIGN			
22	ELSE			
23	IF			
24		Table	U_FA_TERM_VW	
25		Field	FA_LOAD	
26	=			
27		Prompted Value	F	F = Full Time
28	OR			
29		Table	U_FA_TERM_VW	
30		Field	FA_LOAD	
31	=			
32		Prompted Value	H	H = Half Time
33	OR			
34		Table	U_FA_TERM_VW	
35		Field	FA_LOAD	
36	=			
37		Prompted Value	T	T = Three Quarters
38	THEN			
39	ASSIGN	Global Value	RESULT	
40		String	PASS	
41	END ASSIGN			
42	ELSE			
43	ASSIGN	Global Value	RESULT	

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
44		String	FAILED	
45	END ASSIGN			
46	ASSIGN	Global Variable	HR_MSG_SET_NBR	
47		String	21100	
48	END ASSIGN			
49	ASSIGN	Global Variable	HR_MSG_NBR	
50		String	00004	
51	END ASSIGN			
52	END IF			
53	END IF			
54	ELSE			
55	ASSIGN	Global Variable	RESULT	
56		String	FAILED	
57	END ASSIGN			
58	ASSIGN	Global Variable	HR_MSG_SET_NBR	
59		String	FAILED	
60	END ASSIGN			
61	ASSIGN	Global Variable	HR_MSG_NBR	
62		String	00003	
63	END ASSIGN			
64	END IF			

Creating Equity Item Type Groups

To set up equity item type groups, use the Packaging Equity Item Type component (PKG_EQUITY_GROUP).

This section provides an overview of equity item type groups and discusses how to define equity item type groups.

Understanding Equity Item Type Groups

Equity funds are "free money" for students, such as grants and scholarships, and can include parent and student contributions. Equity limits are established as part of the packaging plan and equity offsets reduce the amount of equity funds available to a student. Financial aid item types that are defined as equity awards are applied toward the equity limit when they are awarded.

Equity item type groups enable you to group together financial aid item types, regardless of their defined equity attribute, for consideration as equity offsets within a packaging plan. You can designate a financial aid item type not defined as an equity award as an equity item type by including it in an equity item type group. Using equity item type groups, a group of financial aid item types can be treated as equity awards in one packaging plan but not in another. You do not need to include financial aid item types defined as equity awards in equity item type groups, but nothing prevents you from doing so.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117](#)

Page Used to Create Equity Item Type Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equity Item Group	PKG_EQUITY_GROUP	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Equity Item Types, Equity Item Group	Define an equity item type group. Add or delete financial aid item types from an existing group.

Defining Equity Item Type Groups

Access the Equity Item Group page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Equity Item Types, Equity Item Group).

Equity Item Group

Academic Institution: PSUNV PeopleSoft University
 Aid Year: 2005

Academic Career: UGRD Undergraduate
 Equity Item Group: FEDUNV

Find First 1 of 1 Last

***Effective Date:** 07/26/2004
 Status: Active

Description: Federal /University Equity Awd
 Short Description: Federal /U

Equity Items			
Customize Find View All First 1-2 of 2 Last			
	*Item Type	Description	
1	9000000000100	Federal Pell Grant	+ -
2	9000000000120	University Grant	+ -

Equity Item Group page

Item Type

Select a financial aid item type to include in this equity item type group. All financial aid item types, whether they have been defined as an equity award or not, are available for selection. Insert a new row to add additional financial aid item types to the equity item type group.

Creating Related Item Type Groups

This section provides an overview of related item type groups and discusses how to define related item type groups.

Understanding Related Item Type Groups

To set up related item type groups, use the Related Item Type Group component (PKG_REL_ITEM_GROUP).

Related item type groups are used to award a group of similar funds, such as institutional or endowed restricted funds, in a specific order until the group maximum is met. For example, an institution may have more than 200 endowed or restricted funds from which to award a student. By implementing a related item type group, you can group these funds together in discrete categories for quick evaluation through packaging plans. If the related item type is used in a packaging plan, the packaging plan maximum may also affect the amount awarded from the related item type group. When a related item type is used in a packaging plan, only the financial aid item types for which a student qualifies are actually awarded.

Page Used to Create Related Item Type Groups

Page Name	Definition Name	Navigation	Usage
Related Item Type Group	PKG_REL_ITEM_GROUP	Set Up SACR, Product Related, Financial Aid, Awards, Related Item Type Group, Related Item Type Group	Define related item type groups. Add or delete financial aid item types from an existing group.

Defining Related Item Type Groups

Access the Related Item Type Group page (Set Up SACR, Product Related, Financial Aid, Awards, Related Item Type Group, Related Item Type Group).

Related Item Type Group

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2005
Academic Career: UGRD Undergraduate **Related Item Group:** INST_AWD

Find First 1 of 1 Last

***Effective Date:** 07/26/2004 **Status:** Active

Description: Institutional Awards **Short Description:** Institutn

Group Maximum: \$5,000.00 **Maximum Number of Awards:** 2

Selection Criteria: FAPDUMET1000 [Equation Detail](#)

Related Items			Customize	Find	View All	First	1-3 of 3	Last
Item Type	Description	Processing Order						
9000000000015	Inst Grant 1: Disb Testing	1						
9000000000016	Inst Grant 2: Disb Testing	2						
9000000000017	Inst Grant 3: Disb Testing	3						

Related Item Type Group page

Group Maximum and Maximum Number of Awards

Enter the maximum dollar amount and the maximum number of awards that can be awarded to one student from this related item group.

Selection Criteria

Select an equation that defines the group of students to select for this related item type group from a list of the equations that you created using the Equation Engine. This field is optional; you can use it to refine the group of students who are considered for these awards.

Equation Detail	This link appears only if you enter an equation in the Selection Criteria field. Click to access the Review Equations page and view the selected equation written as an algebraic expression.
Item Type	Select a financial aid item type to include in this related item type group. Insert rows to add additional financial aid item types to the related item type group.
Processing Order	Enter the order in which you want the system to evaluate the associated financial aid item types, with the lowest number evaluated first.

Defining Packaging Plans

This section provides an overview of packaging plans setup and discusses how to:

- Define packaging plan IDs.
- Set up FM packaging target.
- Set up IM packaging target.
- Define packaging equity limits and offsets.
- Define loan and work packaging limits.
- Define packaging rules: item type selection, sequence, and limits.
- Set packaging rule award limits.
- Define packaging rules: award status, disbursement plan, and split code.

Understanding Packaging Plan Setup

To set up packaging plans, use the Packaging Plan component (PACKAGE_PLAN_TABLE).

You can set up as many packaging plans as you want. Each plan can have a different set of awards, with different award limits, targeted for different populations of students. Your philosophy about financial aid awarding informs the setting up and adding of packaging plans. Packaging plans are aid year-specific but can be copied from year to year and modified to reflect any changes for the new aid year. Packaging plans are also career-specific.

Before you define your packaging plans, identify your various student populations and their eligibility for various types of financial aid. Creating a flow chart and ranking the various awards available for each group of students may help you to define what each packaging plan should include and what rules it should incorporate.

Pages Used to Define Packaging Plans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Packaging Plan	PACKAGE_PLAN_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Plan	Define your packaging plans. When you first add a packaging plan you are asked to enter a career to associate with the plan and a packaging plan ID. Packaging plans are career-specific.
Review Equations	SCC_EQUATION_VIEW	Click Equation Detail on the Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page.	View a packaging equation written as an algebraic expression.
Copy Package Plan Data	PACKAGE_COPY	Click the Copy button on the Packaging Plan page.	Copy packaging plan ID information from one combination of institution, aid year, academic career, packaging plan, effective date, and processing order to another.
FM Target	PKG_PLAN_FED_TRGT	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, FM Target	Set up the packaging target for the packaging plan using federal methodology (FM).
IM Target	PKG_PLAN_INST_TRGT	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, IM Target	Set up the packaging target for the packaging plan using institutional methodology (IM).
Equity Rule	PACKAGE_PLAN_LIMIT	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Equity Rule	Define packaging equity limits and offsets.
Packaging Limits	PACKAGE_PLAN_LMT2	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Limits	Define loan and work award limits for this packaging plan. You can define different limits for federal methodology and institutional methodology.

Page Name	Definition Name	Navigation	Usage
Packaging Rules 1	PACKAGE_RULE_TABLE	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Rules 1	Define financial aid item types, GAP financial aid item types, and related item type groups to the packaging plan. Assign a processing sequence, the percentage of the student's remaining need to meet, and the minimum and maximum award amounts.
Packaging Rule Award Limits	PKG_RULE_LIMIT_SEC	Click the Spending Limit Preferences link on the Packaging Rules 1 page.	Set packaging rule award limits by further defining spending limits for the financial aid item type in the packaging plan.
Packaging Rules 2	PACKAGE_RULE_DISB	Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Rules 2	Define the default award action, disbursement plan, and split code for each financial aid item type used in the packaging plan.

Defining Packaging Plan IDs

Access the Packaging Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Plan).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009				
Academic Career: UGRD Undergraduate		Plan ID: FEDERAL				
<div>Find First 1 of 1 Last</div>						
*Effective Date: 01/01/1900		*Status: Active				
Processing Order: 929						
*Award Period: Both						
*Description: FEDERAL						
Short Description: FEDERAL						
Selection Criteria: FAPDUGRADS		Equation Detail				

Packaging Plan page

Processing Order	When the Mass Packaging process has to evaluate many packaging plans during a run, the processing order determines the sequence in which the selected packaging plans are reviewed. The Mass Packaging routine processes the packaging plan with the lowest processing order number first.
Award Period	<p>Select the award period to which the packaging plan applies. The packaging plan's award period is particularly important during multiple award period processing.</p> <p><i>Academic:</i> The packaging rules in this packaging plan apply to the academic award period. If existing awards have disbursement plan/split code combinations that indicate they belong to the academic award period, the existing awards are reevaluated and may be changed or canceled. If the disbursement plan/split code combinations indicate the existing awards belong to the non-standard award period, the existing awards are not reevaluated. If the disbursement plan/split code combinations indicate the existing awards belong to the both award periods, only the portion of the existing awards that belong to the academic award period are reevaluated.</p> <p><i>Both:</i> The packaging rules in this packaging plan apply to the both award periods. All existing awards are reevaluated and may be changed or canceled.</p> <p><i>Non Std (non-standard):</i> The packaging rules in this packaging plan apply to the non-standard award period. If existing awards have disbursement plan/split code combinations that indicate they belong to the non-standard award period, the existing awards are reevaluated and may be changed or canceled. If the disbursement plan/split code combinations indicate the existing awards belong to the academic award period, the existing awards are not reevaluated. If the disbursement plan/split code combinations indicate the existing awards belong to the both award periods, only the portion of the existing awards that belong to the non-standard award period are reevaluated.</p>
Description	For reference, you can include the career that uses this packaging plan in the description for easy identification.
Selection Criteria	Select an equation that determines which students are selected for evaluation with this packaging plan during a Mass Packaging run. You set up these equations with the Equation Engine.
Equation Detail	This link appears only if you enter an equation in the Selection Criteria field. Click to access the Review Equations page and view the selected equation written as an algebraic expression.
Copy	Click this button to access the Copy Package Plan Data page and copy packaging plan ID information from one combination of institution, aid year, academic career, packaging plan, effective date, and processing order to another.

See Also

[Chapter 33, "Managing Special Cases in Packaging," Understanding Multiple Award Period Processing, page 1155](#)

Setting Up FM Packaging Target

Access the FM Target page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, FM Target).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009				
Academic Career: UGRD Undergraduate		Plan ID: FEDERAL				
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		
FM Packaging Target						
<input type="text" value="100.0"/> % of Total Need <input type="checkbox"/> Disable Percentage						
Maximum Amount: <input checked="" type="radio"/> Constant <input type="radio"/> Equation <input type="text"/>						
FM Packaging Target Limit						
<input checked="" type="radio"/> Follow Item Type Limits						
<input type="radio"/> Override at Plan Level for <input type="text"/>						
Maximum Amount: <input checked="" type="radio"/> Constant <input type="radio"/> Equation <input type="text"/>						

FM Target page

The packaging target is defined either as a percentage of the student's financial need or a specific dollar amount or both. For example, the target could be to award students up to 75 percent of their FM need *or* up to 12,000.00 USD, or to award 75 percent of their FM need *up to* 12,000.00 USD. When you populate this page, the packaging plan evaluates the student's FM need. The packaging plan then attempts to award students up to the target amount. You can also establish award amount limits for this packaging plan that are more restrictive than those defined at the financial aid item type level.

FM Packaging Target

% of Total Need (percentage of total need) Enter the percentage of the student's FM need that you want this packaging plan to meet.

Disable Percentage Select this check box if you want the packaging target to be determined by a maximum amount only. Clear if you want to use a maximum amount as well as a percentage to determine the packaging target. If you are not entering a maximum amount, you must clear this check box. When you select both % of Total Need and Maximum Amount you can indicate, for example, that the packaging plan is to meet 80 percent of FM need but only up to a maximum of 5,000.00 USD.

Maximum Amount	<p>Enter the maximum amount of financial aid to be awarded by this packaging plan.</p> <p>Select <i>Constant</i> to use a specific, constant dollar amount as the packaging target.</p> <p>Select <i>Equation</i> to invoke an equation to determine the dollar amount to be used as the FM packaging target. The values in this field include all of the equations that you created using the Equation Engine.</p>
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Note. FFELP or Direct Subsidized and Unsubsidized loans are treated differently by the packaging targets and limits. These awards are not limited by the packaging target because the eligibility for these awards allows them to be given up to the aggregate level maximum without regard to an artificial limit.

FM Packaging Target Limit

Follow Item Type Limits	Select this option to invoke the financial aid item type limits established on the FA Item Type 4 page.
Override at Plan Level for	Select this option to establish award amount limits that differ from those at the financial aid item type level for financial aid item types in a specific meet need/cost category. The meet need/cost categories that you can select in this field are <i>Conditional</i> , <i>Cost Only</i> , <i>No Effect</i> , and <i>Special Need/Cost</i> .
Maximum Amount	<p>Enter the new packaging plan-specific limit for the financial aid item types that you specified in the Override at Plan Level for field.</p> <p>Select <i>Constant</i> to use a specific, constant dollar amount as the limit.</p> <p>Select <i>Equation</i> to use an equation to determine the dollar amount used as the limit. The values include all the equations that you created using the Equation Engine.</p>
Equation Detail	This link is available after you select an equation. Click to view the Review Equations page.

Note. The cost of attendance is always the maximum limit for awarding with a packaging plan except when awarding *No Effect* awards.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117

Setting Up IM Packaging Target

Access the IM Target page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, IM Target).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University			Aid Year: 2009			
Academic Career: UGRD Undergraduate			Plan ID: FEDERAL			
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		
IM Packaging Target						
<input type="text" value="100.0"/> % of Total Need <input type="checkbox"/> Disable Percentage						
Maximum Amount: <input checked="" type="radio"/> Constant <input type="radio"/> Equation <input type="text"/>						
IM Packaging Target Limit						
<input checked="" type="radio"/> Follow Item Type Limits						
<input type="radio"/> Override at Plan Level for <input type="text"/>						
Maximum Amount: <input checked="" type="radio"/> Constant <input type="radio"/> Equation <input type="text"/>						

IM Target page

The packaging target is defined either as a percentage of the student's financial need or a specific dollar amount or both. For example, the target could be to award students up to 80 percent of their IM need *or* up to 8,000.00 USD, or to award 80 percent of their IM need *up to* 8,000.00 USD. When you populate this page, the packaging plan evaluates the student's IM need. The packaging plan then attempts to award students up to the target amount. You can also establish award amount limits for this packaging plan that are more restrictive than those defined at the financial aid item type level.

The fields on this page match those on the FM Target page.

See Also

[Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Setting Up FM Packaging Target, page 251](#)

Defining Packaging Equity Limits and Offsets

Access the Equity Rule page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Equity Rule).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009				
Academic Career: UGRD Undergraduate		Plan ID: FEDERAL				
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		+ -
Equity Limit						
Maximum Amount: <input checked="" type="radio"/> Constant <input type="radio"/> Equation <input type="text"/>						
Offset						
<input type="checkbox"/> Parent Contribution (FM)		<input type="checkbox"/> Parent Contribution (IM)		<input type="checkbox"/> Equity Item Types		
<input type="checkbox"/> Student Contribution (FM)		<input type="checkbox"/> Student Contribution (IM)		Equity Item Group: <input type="text"/>		
<input type="checkbox"/> Social Security Benefits (FM)		<input type="checkbox"/> Social Security Benefits (IM)				

Equity Rule page

Equity packaging enables you to ensure that similar populations of students—all graduates, all teacher credential candidates, all first-time freshmen, all students whose EFC equals zero, and so on—are packaged equally with "free" money from federal, state, institutional, or private sources. The equity target amount—referred to in our system as the equity limit—can be reduced or offset by parent contribution, student contribution, Social Security benefits, equity item type groups, or any combination of these resources. The Packaging routine prevents the student from being awarded an equity award amount (from the equity aid financial aid item types included as packaging rules) that exceeds the equity target amount.

Equity Limit

Maximum Amount Enter the maximum amount of financial aid to be awarded from equity item types for this packaging plan. You must enter an amount or an equation to make the fields in the Offset group box available.

Select *Constant* to use a specific, constant dollar amount as the equity limit. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to invoke an equation to determine the dollar amount used as the equity limit. The values include all the equations that you created using the Equation Engine.

Equation Detail This link is available after you select an equation. Click to view the Review Equations page.

Offset

Reduce the equity amount awarded by the packaging plan by selecting one or more of the offset check boxes. If you select any FM offsets, the IM offsets are not available, and vice versa.

Parent Contribution (FM) (parent contribution Federal Methodology)	<p>Select this check box to use the amount that the student's parent is expected to contribute—as calculated using federal methodology from federal application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as:</p> <ul style="list-style-type: none"> • Academic, the Packaging routine uses the prorated parent contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated parent contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated parent contribution and the non-standard prorated parent contribution as an equity offset.
Student Contribution (FM) (student contribution Federal Methodology)	<p>Select this check box to use the amount that the student is expected to contribute—as calculated using federal methodology from federal application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as:</p> <ul style="list-style-type: none"> • Academic, the Packaging routine uses the prorated student contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated student contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated student contribution and the non-standard prorated student contribution as an equity offset.
Social Security Benefits (FM) (social security benefits Federal Methodology)	<p>Select this check box to use the amount of Social Security benefits received by the student as an equity offset. This amount comes from federal application data.</p>
Parent Contribution (IM) (parent contribution Institutional Methodology)	<p>Select this check box to use the amount that the student's parent is expected to contribute—as calculated using institutional methodology from institutional application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as:</p> <ul style="list-style-type: none"> • Academic, the Packaging routine uses the prorated parent contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated parent contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated parent contribution and the non-standard prorated parent contribution as an equity offset.

Student Contribution (IM) (student contribution Institutional Methodology)	<p>Select this check box to use the amount that the student is expected to contribute—as calculated using institutional methodology from institutional application data—as an offset. The amount used for this field depends on the award period to which this packaging plan is assigned. If the packaging plan designates the award period as:</p> <ul style="list-style-type: none"> • Academic, the Packaging routine uses the prorated student contribution on the academic award period record. • Non-standard, the Packaging routine uses the prorated student contribution on the non-standard award period record. • Both, the Packaging routine uses the sum of the academic prorated student contribution and the non-standard prorated student contribution as an equity offset.
Social Security Benefits (IM) (social security benefits Institutional Methodology)	<p>Select this check box to use the amount of Social Security benefits received by the student as an offset. This amount comes from institutional application data.</p>
Equity Item Types	<p>Select this check box to use an equity item type group as an offset. The Equity Item Group field becomes active when you select this check box.</p>
Equity Item Group	<p>Select an equity item type group to use as an offset. You cannot select an equity item type group without selecting the Equity Item Types check box. Equity item type groups are defined on the Equity Item Group page.</p> <p>See Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Creating Equity Item Type Groups, page 244.</p>

Defining Loan and Work Packaging Limits

Access the Packaging Limits page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Limits).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009				
Academic Career: UGRD Undergraduate		Plan ID: FEDERAL				
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		+ -
Loan Limits						
Federal Maximum:		<input checked="" type="radio"/> Constant <input type="radio"/> Equation		<input type="text"/>		
Institutional Maximum:		<input checked="" type="radio"/> Constant <input type="radio"/> Equation		<input type="text"/>		
Work Limits						
Federal Maximum:		<input checked="" type="radio"/> Constant <input type="radio"/> Equation		<input type="text"/>		
Institutional Maximum:		<input checked="" type="radio"/> Constant <input type="radio"/> Equation		<input type="text"/>		

Packaging Limits page

Loan Limits

Enter a maximum amount awarded by this packaging plan for federal loans and institutional loans.

Federal Maximum

Enter the maximum amount of financial aid from federal loans to be awarded for this packaging plan. The Packaging routine determines whether a loan is a federal loan using the Source field value from the FA Item Type 1 page; if the source is *F—Federal*, then the loan counts toward this limit.

Select *Constant* to use a specific, constant dollar amount as the federal loan limit. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to use an equation to determine the dollar amount used as the federal loan limit. The values include all the equations that you created using the Equation Engine.

Institutional Maximum

Enter the maximum amount of financial aid from institutional loans to be awarded for this packaging plan. The Packaging routine determines whether a loan is a institutional loan using the Source field value from the FA Item Type 1 page; if the source is *I—Institutional*, then the loan counts toward this limit.

Select *Constant* to use a specific, constant dollar amount as the institutional loan limit. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to use an equation to determine the dollar amount used as the institutional loan limit. The values include all the equations that you created using the Equation Engine.

Equation Detail

This link is available after you select an equation. Click to view the Review Equations page.

Work Limits

Enter a maximum amount awarded by this packaging plan for federal work-study and institutional work-study.

Federal Maximum

Enter the maximum amount of financial aid from federal work-study to be awarded for this packaging plan. The Packaging routine determines whether a work-study award is a federal work-study award using the Source field value from the FA Item Type 1 page; if the source is *F*—*Federal*, then the work-study award counts toward this limit.

Select *Constant* to use a specific, constant dollar amount as the federal work-study limit. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to use an equation to determine the dollar amount used as the federal work-study limit. The values include all the equations that you created using the Equation Engine.

Institutional Maximum

Enter the maximum amount of financial aid from institutional work-study to be awarded for this packaging plan. The Packaging routine determines whether a work-study award is a federal work-study award using the Source field value from the FA Item Type 1 page; if the source is *I*—*Institutional*, then the work-study award counts toward this limit.

Select *Constant* to use a specific, constant dollar amount as the institutional work-study limit. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to use an equation to determine the dollar amount used as the institutional work-study limit. The values include all the equations that you have created using the Equation Engine.

Equation Detail

This link is available after you select an equation. Click to view the Review Equations page.

Defining Packaging Rules: Item Type Selection, Sequence and Limits

Access the Packaging Rules 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Rules 1).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University			Aid Year: 2009			
Academic Career: UGRD Undergraduate			Plan ID: FEDERAL			
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		
+ -						
Item Types Find View All First 1 of 6 Last						
Sequence Nbr: 1		% of Total Package 100.0		Spending Limit Preferences + -		
<input type="radio"/> Gap						
<input checked="" type="radio"/> Item Type 900000000100 Federal Pell Grant						
<input type="radio"/> Related Item Group						
Selection Criteria:						
Limited by				Limiting Factor		
Minimum: <input checked="" type="radio"/> Constant <input type="radio"/> Equation 1.00				<input type="radio"/> Nbr Units		
Maximum: <input checked="" type="radio"/> Constant <input type="radio"/> Equation 4,050.00				<input type="radio"/> Nbr Weeks		
				<input checked="" type="radio"/> None		

Packaging Rules 1 page

You should complete the Packaging Rules 1 page in conjunction with the Packaging Rules 2 page.

Item Types

If you are setting up a Pell-only repackaging plan, you can only enter Pell Grant financial aid item types as a packaging rule and you must use the Item Type option.

Sequence Nbr (sequence number) Determines the order in which the system processes the associated packaging rule within the packaging plan.

Gap

Select this option to hold a defined amount that the Awarding process does not award. A gap is a place holder or limit condition. Use it as a means of stretching funds by not covering all unmet need, or use it as a method of reserving unmet need for specific institutional funds or additional external awards later.

The Packaging routine first reviews the aid processing rule assigned to the student's program, and uses the GAP financial aid item type associated with the aid processing rule. If an aid processing rule is not associated with the program or no GAP financial aid item type has been assigned to the aid processing rule, the Packaging routine reviews the aid processing rule assigned to the student's career (as specified on the Valid Careers for Aid Year page) to determine the GAP financial aid item type. If no aid processing rule has been assigned to the student's career, or no GAP financial aid item type has been assigned to the aid processing rule, the Packaging routine uses the GAP financial aid item type entered on the Financial Aid Defaults page.

Note. Because the Packaging routine dynamically determines the GAP financial aid item type based on defaults (aid processing rule set or installation defaults), you do not (and cannot) enter the GAP financial aid item type on this page. You receive a conversion program to blank out the financial aid item type if the packaging rule is a GAP packaging rule for your existing records.

Item Type

Select this option to associate a financial aid item type with this packaging plan. Enter the financial aid item type that you want the packaging plan to award. For a financial aid item type value to be available, the financial aid item type must be defined as an auto package award.

See [Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117.](#)

Related Item Group

Select this option to associate a related item type group with this packaging plan. Enter the related item type group that you want the packaging plan to award.

Selection Criteria

Enter an equation in this field if additional awarding selection criteria are to be used specifically with this plan for this particular financial aid item type.

Equation Detail

This link is available after you have select an equation. Click to view the Review Equations page.

% of Total Package
(percentage of total package)

Enter the percentage of the student's remaining unmet need that this financial aid item type can cover. For example, you could indicate that no more than 10 percent of the student's remaining unmet need can be awarded from a university grant. The percentage amount can include one decimal place, for example 8.5 percent.

Spending Limit
Preferences

Click this link to access the Packaging Rule Award Limits page and further limit or control spending for the financial aid item type in this specific packaging plan.

Limited By

Set additional maximum and minimum limits for this financial aid item type in this specific packaging plan. When Auto Packaging and Mass Packaging determine award amounts and when you run the Validation process, all eligibility rules, aggregate limits, minimum and maximum award limits, fiscal fund availability, and financial aid item type rules are checked. When determining the maximum award limit, the lowest maximum award limit from the maximum limits set at the item type, financial aid item type, aggregate aid, fiscal item type, and packaging plan levels is used. The minimum award limit used is the lowest minimum award limit from the minimum limits set at the item type, financial aid item type, and packaging plan levels.

Minimum

Enter the minimum amount of financial aid from this financial aid item type to be awarded per term for this packaging plan.

Select *Constant* to assign a specific, constant dollar amount as the award minimum. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to invoke an equation to determine the dollar amount used as the award minimum.

Maximum

Enter the maximum amount of financial aid from this financial aid item type to be awarded per term for this packaging plan.

Select *Constant* to assign a specific, constant dollar amount as the award maximum. Enter the dollar amount in the field to the right of the Equation option.

Select *Equation* to invoke an equation to determine the dollar amount used as the award maximum.

Equation Detail

This link is available after you select an equation. Click to view the Review Equations page.

Limiting Factor

Choose to further limit the award amount after the system determines the annual award amount. You must select one of the three options in this group box.

Nbr Units (number of units)

This option is not supported. Select to limit the awards of this financial aid item type based on the number of units the student is taking.

Nbr Weeks (number of weeks)

This option is not supported. Select to limit the awards of this financial aid item type based on the number of weeks the student is enrolled.

None

Select this option if this is a Pell financial aid item type or if you want no additional limiting factors to be considered for awards of this financial aid item type.

Setting Packaging Rule Award Limits

Access the Packaging Rule Award Limits page (click the Spending Limit Preferences link on the Packaging Rules 1 page).

Packaging Rule Award Limits

Spending Limit for Item Types

☐ No Spending Limit

☒ Use Remaining Fund Balance

☐ Specify Amount

☐ % of Original Fund Balance

OK

Cancel

Packaging Rule Award Limits page

Select one of the four options for limiting the total amount awarded for this financial aid item type. The spending limit that you set up here affects this financial aid item type only when it is used in this packaging plan.

- No Spending Limit

No fiscal limits are set when awarding this financial aid item type in this packaging plan. By selecting this option, the packaging plan awards as much money as is needed for each student who receives this packaging plan. You can use this option to forecast how much money you would need from this financial aid item type for the upcoming fiscal year.

Be extremely careful when you select this option. Use it only when you are running Mass Packaging in simulation mode.
- Use Remaining Fund Balance

This is the default value. The financial aid item type can be awarded up to the maximum amount available in the specified fiscal item type fund.
- Specify Amount

Enter a fixed dollar amount as the limit to be awarded from this financial aid item type per student.
- % of Original Fund Balance (percentage of original fund balance)

The financial aid item type can be awarded up to the indicated percentage of the available fiscal item type fund balance (not the budgeted, or original, fiscal item type fund balance). For example, you could limit spending for each student for the University Grant to no more than 1 percent of the University Grant's available fiscal balance of 800,000.00 USD. In this example, you would have 8,000.00 USD to award from the University Grant financial aid item type for this student.

See Also

[Chapter 5, "Setting Up Packaging Basics," Budgeting Fiscal Limits, page 132](#)

Defining Packaging Rules: Award Status, Disbursement Plan and Split Code

Access the Packaging Rules 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Packaging Plan, Packaging Rules 2).

Packaging Plan	FM Target	IM Target	Equity Rule	Packaging Limits	Packaging Rules 1	Packaging Rules 2
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009				
Academic Career: UGRD Undergraduate		Plan ID: FEDERAL				
Find First 1 of 1 Last						
Effective Date: 01/01/1900		Status: Active		Processing Order: 929		
Item Type Defaults Find View All First 1 of 6 Last						
Sequence Nbr: 1		Item Type: 900000000100		Federal Pell Grant		
Award Action: Offer/Accept						
Disbursement Plan						
<input checked="" type="radio"/> Use Item Type Default <input type="radio"/> Override Default		Disb Plan: 01 Two Semesters				
Split Code						
<input checked="" type="radio"/> Use Item Type Default <input type="radio"/> Override Default <input type="radio"/> Custom Split Defined By:		Split Code: 01 Equal across terms				

Packaging Rules 2 page

You should complete the Packaging Rules 2 page in conjunction with the Packaging Rules 1 page.

Item Type Defaults

The system identifies the sequence number of the proposed award and whether the packaging rule is for a financial aid item type, related item type group, or GAP item type.

Award Action

Enter the default award action that you want the system to use when awarding this financial aid item type to the student. The default award action appears in the Action field on the award entry pages for the financial aid item type associated with this packaging rule.

B-Offer/Accept: The Packaging routine awards this financial aid item type as accepted. Both the Offered and Accepted fields on the award entry pages are populated with the same amount when the award is made. You may want to use this value for grants and scholarships.

O-Offer: The Packaging routine awards this financial aid item type as offered only. Only the Offered field on the award entry pages is populated when the award is made. The Accepted field remains at zero. You must subsequently accept, decline, or cancel this award for future processing.

See [Chapter 28, "Awarding and Packaging Students," Awarding Online, page 990](#)

-

Disbursement Plan

- Use Item Type Default** This is the default option. Select to use the default disbursement plan established for this financial aid item type. The system automatically populates the Disb Plan (disbursement plan) field on this page with the default disbursement plan specified in the financial aid item type setup.
- Override Default** Select to set up a different default disbursement plan for this financial aid item type when used with this packaging plan. You must enter the desired default disbursement plan in the Disb Plan field.
- Disb Plan** (disbursement plan) The disbursement plan instructs the system what pattern of disbursement to use for this financial aid item type.

Split Code

In this group box, you can decide whether to use the default disbursement split for this financial aid item type or select a specific disbursement split to use for this financial aid item type in this packaging plan.

- Use Item Type Default** This is the default option. Select to use the default split code established for this financial aid item type. The system automatically populates the Split Code field on this page with the default split code.
- Override Default** Select this option to set up a different default split code for this financial aid item type when used with this packaging plan. Enter the new default split code in the Split Code field.
- Split Code** Defines how the award disbursements are split among terms.
- Custom Split Defined By** *This field is inactive. For future use.*

Note. The selected split code is used unless the student's enrollment pattern varies from the pattern defined by the chosen split code. In that case, the system returns a custom split code and disbursement plan that match the student's actual enrollment. For example, if the split code divides the award evenly between three quarters of the academic year, but the student is only attending two of the three quarters, the system splits the disbursement between two terms instead of three.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Default Disbursement Plans and Split Codes, page 127](#)

[Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112](#)

Chapter 9

Setting Up Repackaging

This chapter provides an overview of repackaging strategy and rules and discusses how to:

- Set up a repackaging plan.
- Set up Repackaging processing.

See Also

Chapter 6, "Setting Up ACG and SMART Grants," page 147

Understanding Repackaging Strategy and Rules

This section lists prerequisites and discusses:

- Repackaging strategy.
- Repackaging students with multiple careers.
- Increase rule.
- Decrease rule.
- Original package plan rule.
- Validate entire package rule.
- Validate item type rule.

Prerequisites

Before using Repackaging plans:

- Create related item type groups.
- Create a flat file to define the repackaging selection population using any flat file editor.
- Create a query to define the repackaging selection population using PS Query.
- Create an equation to define the repackaging selection population as Batch Repackaging Selection (A_SELECT) using the Equation Engine.

- Create an equation to define the repackaging plan assignment population as Fin Aid Packaging Select Eqtns (financial aid packaging select equations) (A_SELECT) using the Equation Engine.
- Review the Don't Repackage attribute on Financial Aid Item Types to determine which awards should be excluded from Repackaging. Set the attribute accordingly.
- Review the default disbursement plan and split code at the financial aid item type level. Repackaging uses this when inserting new or validating existing awards.

Note. Unlike Packaging, locked awards are always preserved and unchanged for Repackaging. Even if the student is overawarded, the Repackaging process retains a locked award in its entirety.

Repackaging Strategy

Repackaging, or reevaluating awards, maintains a package that adheres to the packaging philosophy of your institution. The objective of the repackaging strategy is to resolve unmet need or need overaward. When additional awards are posted for a student after an original set of awards is established, or when additional funding becomes available, Repackaging can automate the Re-Awarding process.

Factors that may necessitate Repackaging include, but are not limited to:

- Reevaluation of Pell Grant eligibility.
- Update of state awards.
- Receipt of outside scholarships.
- Posting of departmental awards.
- Notification from the Bursar Office.
- Loan Certification Requests.
- Funding increases.
- Attrition.

You can define repackaging rules based on the population being reevaluated. To structure repackaging rules to protect certain awards, use the Don't Repackage attribute on the financial aid item type.

The basic repackaging rules and uses are:

Increase	Insert new awards into the student's existing package to fill unmet need.
Decrease	Reduce one or more awards in the student's package to address an overaward condition.
Original Package Plan	Use the Packaging plan most recently used to repackage this student.
Validate entire package	Reconsider the student's entire set of awards for continued eligibility and award amount.

Validate item type	Reconsider a specific award for the student for continued eligibility and award amount.
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As with Packaging plans, Repackaging plans can include a single rule or a combination of rules. The options and available parameters vary by rule.

Repackaging Students with Multiple Careers

The Mass Packaging and Repackaging processes handle students with multiple careers similarly. For multiple repackaging plans for careers, the order in which these repackaging plans are invoked determines the award outcomes. As part of both repackaging setup and Repackaging processing, you must specify which career or the order of careers to reevaluate.

On the Repackaging Plan setup component, assign the processing order sequentially by career. Then, on the run control options for the Repackaging process, specify the careers that should be repackaged. For example, Career1 RPKG1, Career1 RPKG2, Career2 RPKG1, Career2 RPKG2 might be the order. The system repackages the student for each career based on the processing order associated with the repackaging plan.

Note. If no awards exist on the student's package for a particular career, the student is not repackaged for that career, and the user receives the following message: *9590 - Student has no awards for the specified Academic Career.*

For Auto Repackaging, select the career against which the student will be repackaged and then click the Repackage button. If you specify a repackaging plan before clicking the Repackage button, the system ensures that the selected plan matches the selected career before repackaging the student. If you do not specify a repackaging plan before clicking the Repackage button, the system evaluates the selection criteria and the processing order of the repackaging plan table, and then it processes the student for the first matching repackaging plan for that career. If it does not find an eligible repackaging plan, the student is not repackaged.

Increase Rule

If a student has any remaining unmet need, use this rule to attempt to increase the student's existing package with a specific item type or related item type group. You must designate a default disbursement plan and split code at the FA item type level to repackage the student with this item type.

If the item type being evaluated already exists in the student's original package and the student demonstrates additional eligibility for the item type during repackaging, then a second instance of that item type is awarded. Eligibility includes checking aggregate limits, need determination, and federal eligibility requirements. Posting combines the two instances into a single instance. Posting also assigns attributes from the first (original) instance, such as sequence number, award status, and lock attributes, to the adjusted award. The disbursement plan must match for both instances or posting of the second instance fails. If the disbursement plans match, but the split code differs between the two, a custom split (XX) is posted.

If the item type being evaluated does not already exist in the student's original package and the student demonstrates eligibility for the item type during repackaging, the award is handled as a new award.

If the student does not demonstrate eligibility for the award during repackaging, the award is returned as a 0 USD award with a message describing the failed eligibility.

You can use the Increase rule to offer additional awards with an award action of *Offer* or *Offer/Accept*. This award action is only available for the Increase packaging rule. (Remember that when the first and second instances of an award are combined during posting, the combined award possesses the attributes of the first instance).

You can use multiple Increase rules in a repackaging plan to increase the student's package. You specify the sequence for these rules within the plan.

At the repackaging rule level, you can target your increase population by specifying a need threshold for the increase to occur. Need threshold can be based on Federal unmet need, Federal unmet Cost of Attendance (COA), Institution unmet need, or Institution unmet COA. For example, if all students who have a sizable unmet need have an increase applied to them, the threshold can be a Federal unmet need amount that is greater than 1,000 USD.

Decrease Rule

Use this rule for overaward situations, either overages in need or COA. You can reduce the student's package based on one of these decrease methods:

- **Bottom-Up Reduction.** The Repackaging process reduces the student's package by the overaward amount beginning with the highest sequenced award. It processes through to the lowest sequenced award until the student is no longer in an overaward condition. The system might cancel or reduce multiple awards to eliminate the overaward condition.
- **Item Type.** The Repackaging process reduces the student's package based on the selected item type. If the item type is in the original package, the item type is reduced or canceled based on the overaward amount. If the item type is not in the original package, no reduction occurs.
- **Reduce Awards by type/source.** The Repackaging process reduces the student's package based on award type, award source, or both. For example, the type might be Loan and the source might be Federal, Institution, State, or Private. The student package is reduced starting with the lowest sequenced award matching the type and source combination through to the highest sequenced award until the student is no longer in an overaward condition. The system might cancel or reduce multiple awards to eliminate an overaward condition.

Note. An overaward condition can exist even after an item type is canceled.

At the repackaging rule level, you can target your decrease population by specifying a need threshold for the reduction to occur. Need threshold can be based on Federal overaward, Federal overaward COA, institution overaward, or institution overaward COA. For example, if all students who are in an overaward condition should have a decrease applied to them, the threshold can be a Federal overaward amount that is greater than zero.

You can choose to reduce or cancel awards below their disbursed amounts by overriding the Disbursement Protection attribute established on the FA Item Type 2 page.

Original Package Plan Rule

Use this rule to repackage the student but maintain the award rules and percentage of awards of the original packaging plan used to package the student. The system reevaluates the student's package using the same eligibility rules and limit controls (aggregate, package plan, item type) as used in the packaging plan.

Note. Do not combine other repackaging rules with this rule in a repackaging plan.

If the student was not previously packaged by the Auto Packaging feature or the Mass Packaging feature and no packaging plan ID exists, an attempt to repackage with this rule fails. This error message is sent: Bypassed during Repackaging Process - no assigned Packaging plan found.

You can choose to reduce or cancel awards below their disbursed amounts by overriding the Disbursement Protection attribute established on the FA Item Type 2 page.

For the Original Package Plan rule, the Repackaging process:

- Cancels all awards except those loaded by the External Award process, locked awards, and item types defined with the Don't Repackage attribute.
- Reduces all disbursement protection awards down to the disbursed amount or below if the Reduce/Cancel Disbursed Amount check box is selected.
- Repackages the student, reevaluating from lowest sequence number to highest sequence number.

For example, if a student was originally eligible for a Student Education Opportunity Grant (SEOG) because the student filed early and money was available but then during repackaging SEOG funds are no longer available or the student now fails to meet the eligibility criteria, the student is not awarded the SEOG during repackaging unless it is a locked award or it is designated as Don't Repackage on Financial Aid Item Type setup.

Validate Entire Package Rule

Use this rule to validate all awards contained in the package. This rule is useful when you must ensure continual eligibility and an award amount in the student's package. You can also use this rule when a student receives an external award and you must confirm that the outside scholarship has not created an overaward condition.

If you use this rule, also using an Increase or Decrease rule with need thresholds handles the case in which using this rule results in either an unmet need or an overaward condition.

To reevaluate your students for continued Pell Grant eligibility due to enrollment changes, you must insert a Validate Item Type Rule for your Pell item type. To accomplish this, you must specify two repackaging rules:

- Validate item type = Pell item type
- Validate entire package

This rule processes awards from the lowest sequenced award to the highest sequenced award, and it does not reduce locked awards. It protects external awards and disbursement-protected awards from changes.

Optionally, select the Reduce/Cancel disbursed amount parameter if you want to reduce or cancel awards below their disbursed amounts. This attribute overrides the Disbursement Protection attribute established on the FA Item Type 2 page.

Validate Item Type Rule

Use this rule to validate any specific item type. To validate more than one item type, insert a rule for each item type in a repackaging plan. If you use this rule, you should also use an Increase or Decrease rule with need thresholds in case the use of this rule results in either an unmet need or an overaward condition.

Before using this rule, ensure that the selected financial aid item type has a default disbursement plan and split code value on the FA Item Type page or Repackaging fails. For example, when validating Pell Grants, you must have an associated default disbursement plan and split code value defined on the FA item type page setup.

To reevaluate your students for continued Pell Grant eligibility due to enrollment changes, you must insert a Validate Item Type rule for your Pell item type.

Setting Up a Repackaging Plan

This section discusses how to:

- Exclude an item type from repackaging.
- Define repackaging rules.

This section also provides examples of repackaging rules.

Pages Used to Set Up a Repackaging Plan

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define meet need/cost, packaging methodology, and several lock and rounding attributes.
Repackaging Plan	SFA_RPKG_PLAN_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Repackaging Plan, Repackaging Plan	Define repackaging population and rules, and establish the sequence of the repackaging rules. Also, define the repackaging rules within the repackaging plans.

Excluding an Item Type from Repackaging

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Financial Aid Item Types, FA Item Type 2).

FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
SetID: PSUNV Item Type: 900000000001 Frank Lee Scholarship Aid Year: 2007 Financial Aid Year 2006 - 2007					
Awarding Rules Find View All First 1 of 1 Last					
Effective Date: 01/28/2005 Status: Active Fed/Inst Affected: Both Fed and Inst Meet Need/Cost: Straight Need/Cost Packaging Methodology: Federal Methodology Selection Criteria:			Rounding Rules Rounding Option: Dollar Round Direction: Nearest Award Remainder Rule: 1st-Cents Fee Remainder Rule: <input type="checkbox"/> Truncate Fees		
<input checked="" type="checkbox"/> Need Based <input checked="" type="checkbox"/> Auto Package <input type="checkbox"/> Self Help Award <input type="checkbox"/> Package Only Once <input type="checkbox"/> Lock Award <input checked="" type="checkbox"/> Equity Award <input checked="" type="checkbox"/> Don't Repackage <input type="checkbox"/> Disbursement Protection					

FA Item Type 2 page

Select the Don't Repackage check box if this item type should be protected during repackaging. If this check box is selected, this award is not be modified during repackaging unless the repackaging rule explicitly includes this item type. Even if this check box is selected, if this item type is specified on the repackaging plan setup, its presence negates the Don't Repackage action and exposes the award to repackaging.

Note. This attribute does not apply to packaging plans, only to repackaging plans.

Defining Repackaging Rules

Access the Repackaging Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Repackaging Plan, Repackaging Plan).

Repackaging Plan			
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2007	
Academic Career: GRAD Graduate		Repackaging Plan ID: DECBTUPCOA	
Repackaging Target			
Find First 1 of 1 Last			
*Effective Date:	01/01/1900 31	*Status:	Active
*Description:	RPKG: Decrease BOTExcl=NO COA	*Processing Order:	110
*Award Period:	Both	Short Description:	DECBTUPCOA
		Selection Criteria:	FAPDDCBTEXCN Equation Detail
FM Need Target:	<input type="radio"/> Constant <input type="radio"/> Equation <input checked="" type="radio"/> Percent	% Need FM:	100.0
IM Need Target:	<input type="radio"/> Constant <input type="radio"/> Equation <input checked="" type="radio"/> Percent	% Need IM:	100.0
Repackaging Rule			
Find View All First 1 of 2 Last			
Rule Nbr	1		
Repackaging Rule	Decrease		
Need Threshold	Federal overaward COA	Tolerance	
Method	Bottom-up Reduction		
<input type="checkbox"/> Reduce/Cancel disbursed amount			

Repackaging Plan page

Repackaging Target

Most of the target fields are similar to the fields used to create packaging plans.

Processing Order Enter a sequence number to define the order in which batch repackaging and auto select repackaging evaluate the repackaging plan table for selection.

When the Repackaging process has many repackaging plans to evaluate, the processing order determines the sequence in which the selected repackaging plans are reviewed, from lowest processing order number to highest.

Award Period Select a value to define the award periods for which the student is reevaluated during repackaging. Select *Academic*, *Non-standard*, or *Both*.

Selection Criteria Select an equation to identify which students are evaluated by this repackaging plan. You have defined these equations as *Fin Aid Packaging Select Eqtns* (A_SELECT) using Equation Engine.

FM Need Target Define the Federal Methodology need to be met during repackaging. Define the target as a constant amount, an equation, or a percent of the student's financial need.
(Federal Methodology need target)

IM Need Target Define the Institution Methodology need to be met during repackaging. Define the target as a constant amount, an equation, or a percent of the student's financial need.
(Institution Methodology need target)

Repackaging Rule

Rule Nbr (rule number) Enter a number that indicates the sequence in which this rule is evaluated when you have multiple rules in a repackaging plan. For a single-rule plan, enter *1*.

Repackaging Rule

Select a rule from these values:

- *Increase*: Insert new awards into the student's existing package to fill an unmet need.
- *Decrease*: Reduce one or more awards in the student's package to address an overaward condition.
- *Original Package Plan*: Use the packaging plan most recently used to repackage this student.
- *Validate entire package*: Reconsider the student's entire set of awards for continued eligibility and award amount.
- *Validate item type*: Reconsider a specific award for the student for continued eligibility and award amount.

Need Threshold

This field appears only for the Increase rule or the Decrease rule. Select a value for the selected rule.

For the Increase rule, select one of these values to determine whether the student meets the need threshold:

- *Federal unmet need*
- *Federal unmet COA*
- *Institution unmet need*
- *Institution unmet COA*

For the *Decrease* rule, select one of these values to determine whether the student meets the need threshold:

- *Federal overaward*
- *Federal overaward COA*
- *Institution overaward*
- *Institution overaward COA*

Tolerance

Appears only for the Increase rule or the Decrease rule. Specify the monetary amount for the Need Threshold value:

- For the Increase rule, if an unmet need exceeds the tolerance amount, the student is evaluated for an increase in funds.
- For the Decrease rule, if the overaward exceeds the tolerance amount, the student is evaluated for a reduction in package.

If the Need Threshold field is left blank (the default value), then the tolerance amount is 0.

Method

Appears only for the Increase, Decrease, or Validate item type rule. Select a value for the selected rule:

- For the Increase rule, select to increase the student's funds by a single *Item Type* or a *Related Item Group*. Corresponding fields that appear define the item type or item type group.
- For the Decrease rule, select to decrease the student's funds by reducing awards by *Item Type* or *Bottom-Up Reduction*, or to *Reduce Award by type/source*. *Item Type* reduces specified awards. *Bottom-Up Reduction* reduces awards starting from the last or highest sequence number award. *Reduce Award by type/source* reduces awards that match to specified types, sources, or both. It reduces awards starting from the first or lowest sequence number award.
- For the Validate item type rule, select *Item Type* to evaluate a single award. To evaluate more than one item type, insert multiple Validate item type rules into your repackaging plan.

Item Type

Appears only for the Increase, Decrease, or Validate item type rule and the Item Type method. Select a financial aid item type number of award to be evaluated.

Sequence

Appears only for the Increase rule and the Item Type method. Indicate where in the package this item type should be inserted: *First* (lowest sequence number), *Last* (highest sequence number), *Before* a specified item type, *After* a specified item type, or *After need based award*. If no need-based award exists, the award is placed first. Need-based awards are defined by a *Straight Need/Cost* value in the Meet Need/Cost field on the FA Item Type 2 page.

Note. The subsidized loan is a Straight Need/Cost item type and it precedes the unsubsidized loan, a Special Need/Cost item type. If both a subsidized loan and an unsubsidized loan exist in the student's package during a Repackaging increase and the increase sequence is *After need based award*, a new award might be inserted following the subsidized loan because it is the last need-based award. That is, the new award can appear between the subsidized and unsubsidized loan.

Disbursement Plan/Split Code	<p>Appear only for <i>Increase</i> and <i>Validate Item Type</i> rules.</p> <p>Enter the Disbursement Plan and Split Code you want to use in this rule.</p> <p>When inserting a new repackaging rule, the values default to the those from FA Item Type for the corresponding career. If left blank, Repackaging uses the values from FA Item Type for the corresponding career.</p> <p>For an <i>Increase</i> rule, the system always uses the values entered here, if any.</p> <p>For a <i>Validate Item Type</i> rule, Repackaging:</p> <ul style="list-style-type: none"> • for an <i>existing non-zero award</i>, uses the Disbursement Plan/Split Code value tied to the award; • for an <i>existing canceled award that's a Pell, ACG, or SMART award</i>, uses the Disbursement Plan/Split Code value first from the Repackaging Rule, if populated. Otherwise, it uses the Disbursement Plan/Split Code value from FA Item Type for the corresponding career. <hr/> <p>Note. When the Repackaging Rule is <i>Validate Entire Package</i> and the award status is either Offered or Offer/Accept, Repackaging uses the Disbursement Plan/Split Code tied to the award and <i>not</i> the Disbursement Plan/Split Code tied to the item type.</p> <hr/>
Minimum	Appears only for the Increase rule. Enter a constant dollar amount or an equation name as the minimum that the Repackaging process should attempt to award.
Maximum	Appears only for the Increase rule. Enter a constant dollar amount or an equation name as the maximum that the Repackaging process should attempt to award.
Limited by	Appears only for the Validate item type rule. Leave it blank, which is the default, to set no limits. Select <i>Constant</i> to enter a dollar amount, <i>Equation</i> to enter an equation name, or <i>Original Award</i> driven by the offered amount or the accepted amount based on the award action tied to the award.
Validate remainder of package	Appears only for the Increase, Decrease, or Validate item type rules and the Item Type method. Select this check box to validate remaining awards from the point of rule to the end of the package. This option does not reduce locked awards. To validate only the selected item type, clear this check box.
Reduce/Cancel disbursed amount	Appears only for the Decrease, Validate item type, Original Packaging Plan, and Validate entire package rules. Select this check box to override the Disbursement Protection attribute established on the FA Item Type 2 page and to reduce or cancel awards below their disbursed amounts.

Related Item Group

Appears only for the Increase rule and the Related Item Group method. Select a group of item types previously defined on the Related Item Type Group component (PKG_REL_ITEM_GROUP) to increase a student's package.

Note. The system can review an unlimited number of item types in a related item group, but it can insert only up to nine new awards into the student's existing package during repackaging. Because the sequence numbers increase in tens, as many as nine numbers can be inserted between existing awards. For example, if sequence 30 is SEOG and sequence 40 is Univ Grant, nine new awards can be inserted between SEOG and Univ Grant (31 through 39) using the Related Item Group method.

Examples of Repackaging Rules

This section shows examples of how these rules are used in a plan to resolve specific situations:

- Increase rule - example 1.
- Increase rule - example 2.
- Multiple Decrease rule.
- Validate item type rule.
- Multirule plan to evaluate the entire package.

Increase Rule - Example 1

Access the Repackaging Plan page and select *Increase* in the Repackaging Rule field.

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University	Aid Year: 2007	
Academic Career: GRAD Graduate	Repackaging Plan ID: INC_RIT	

[Find](#) First ◀ 1 of 1 ▶ Last

*Effective Date: 01/01/1900	*Status: Active ▼	*Processing Order: 116	Copy + -
*Description: RPKG: Increase RIT		Short Description: INCR_RIT	
*Award Period: Both ▼		Selection Criteria: FAPDINC_RIT	Equation Detail

FM Need Target: <input type="radio"/> Constant <input type="radio"/> Equation <input checked="" type="radio"/> Percent	% Need FM: 100.0
IM Need Target: <input type="radio"/> Constant <input type="radio"/> Equation <input checked="" type="radio"/> Percent	% Need IM: 100.0

Repackaging Rule

[Find](#) | [View All](#) First ◀ 1 of 1 ▶ Last

[+ -](#)

Rule Nbr	1		
Repackaging Rule	Increase ▼		
Need Threshold	Federal unmet need ▼	Tolerance	100.00
Method	Related Item Group ▼		
Related Item Group	GRANTSCH		
Minimum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	100.00	
Maximum:	<input checked="" type="radio"/> Constant <input type="radio"/> Equation	5,000.00	

Example of an Increase repackaging rule with a Related Item Group method

This example demonstrates how all students with a Federal unmet need greater than 100 USD are evaluated for several grants with the objective of increasing funds in their package by a maximum of 5000 USD.

This table lists key parameters for the Increase rule and describes each parameter:

Parameter	Description
Need Threshold and Tolerance	Set the target need to be evaluated to a need threshold: <i>Federal unmet need</i> , <i>Federal unmet COA</i> , <i>Institution unmet need</i> , or <i>Institution unmet COA</i> . Then establish a dollar threshold or Tolerance. For example, you could evaluate all students with a Federal Unmet Need greater than or equal to 2,000 USD.
Method	Insert a single item type or a related item type group. When the method is Item type, specify where to insert the award into the student's package. Note that if the new award follows any Special Need/Cost Item types and unmet need still exists, the Special Need item type fills unmet need before the new item type is evaluated.
Minimum and Maximum	Define the award minimum or maximum as a constant dollar amount or an equation.

Increase Rule - Example 2

Access the Repackaging Plan page.

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2007
Academic Career: UGRD Undergraduate **Repackaging Plan ID:** RPKG_STAT

Repackaging Target Find First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status:** Active ***Processing Order:** 991

***Description:** Repkg Plan for status **Short Description:** status

***Award Period:** Both **Selection Criteria:**

FM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need FM:** 100.0
IM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need IM:** 100.0

Repackaging Rule Find View All First 1 of 1 Last

Rule Nbr 1
Repackaging Rule Increase
Need Threshold Federal unmet need **Tolerance**
Method Item Type **Action** Offer/Accep
Item Type 900000000001 **Sequence** Last
 Frank Lee Scholarship
Minimum: ☒ Constant ☐ Equation 100.00
Maximum: ☒ Constant ☐ Equation 8,000.00

Example of the Repackaging Plan page (Increase rule)

This example shows a repackaging plan setup to award an additional amount of 8,000 USD, using the Frank Lee Scholarship item type, with an award action of *Offer/Accept*.

Access the Student Aid Package page.

Student Aid Package Need Summary Term Summary

Clemens,Demi B **ID:** FAPK0160
Aid Year: 2007 Financial Aid Year 2006 - 2007 **Institution:** PSUNV

Career: UGRD Undergrad **Package Status:** Completed [Award Notification](#)
Packaging Plan ID: **Aggregate Source:** Default
Repackaging Plan ID: **Award Period:** Both

Award Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	900000000001	Frank Lee Scholarship	2,000.00	0.00	01	01	Disbursement

Example of the Student Aid Package page with an award in Offered status

This example shows that the student has an existing award (Frank Lee Scholarship) for 2,000 USD in *Offered* status.

Student Aid Package | Need Summary | Term Summary

Clemens, Demi B ID: FAPK0160
 Aid Year: 2007 Financial Aid Year 2006 - 2007 Institution: PSUNV

Career: UGRD Undergrad Package Status: Completed [Award Notification](#)
 Packaging Plan ID: Retrieve Aggregate Source: Default Validate
 Repackaging Plan ID: RPKG_STAT Repackage Award Period: Both Post Reset

Award		Status									
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code			
10		UGRD	9000000000001	Frank Lee Scholarship	2,000.00	0.00	01	01		Disbursement +	
20		UGRD	9000000000001	Frank Lee Scholarship	8,000.00	8,000.00	01	01		Disbursement +	

Example of the Student Aid Package page after Repackaging

This example shows that the repackaging plan has awarded the student a second instance of the Frank Lee Scholarship for an additional amount of 8,000 USD.

Student Aid Package | Need Summary | Term Summary

Clemens, Demi B ID: FAPK0160
 Aid Year: 2007 Financial Aid Year 2006 - 2007 Institution: PSUNV

Career: UGRD Undergrad Package Status: Completed [Award Notification](#)
 Packaging Plan ID: Retrieve Aggregate Source: Default Validate
 Repackaging Plan ID: RPKG_STAT Repackage Award Period: Both Post Reset

Award		Status									
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code			
10		UGRD	9000000000001	Frank Lee Scholarship	10,000.00	0.00	01	01		Disbursement +	

Example of the Student Aid Package page with the combined award after posting

When you post the awards, the system combines the two instances of the Frank Lee Scholarship item type into a single award of 10,000 USD.

Note. The system sets the final award action to *Offered* status because the first instance of the Frank Lee Scholarship was in *Offered* status.

Multiple Decrease Rule Plan

Access the Repackaging Plan page and select *Decrease* in the Repackaging Rule field.

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate
Aid Year: 2007
Repackaging Plan ID: DECREASE

Find First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status:** Active ***Processing Order:** 300 [Copy](#) [+](#) [-](#)

***Description:** Decrease by Type and Source **Short Description:** DECREASE

***Award Period:** Both **Selection Criteria:** FAPDDECTEST [Equation Detail](#)

FM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need FM:** 100.0
IM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need IM:** 100.0

Repackaging Rule

Find View 1 First 1-4 of 4 Last [+](#) [-](#)

Rule Nbr 1

Repackaging Rule Decrease

Need Threshold Federal overaward **Tolerance**

Method Reduce awards by type/sou

Financial Aid Type Loan **Source** Federal

☐ Reduce/Cancel disbursed amount

Example of the Repackaging Plan page with multiple decrease rules (1 of 2)

Rule Nbr	2				+ -
Repackaging Rule	Decrease				
Need Threshold	Federal overaward	Tolerance			
Method	Reduce awards by type/sou				
Financial Aid Type	Loan	Source	Institutnl		
<input checked="" type="checkbox"/> Reduce/Cancel disbursed amount					
Rule Nbr	3				+ -
Repackaging Rule	Decrease				
Need Threshold	Federal overaward COA	Tolerance			
Method	Reduce awards by type/sou				
Financial Aid Type	Loan	Source	Federal		
<input type="checkbox"/> Reduce/Cancel disbursed amount					
Rule Nbr	4				+ -
Repackaging Rule	Decrease				
Need Threshold	Federal overaward COA	Tolerance			
Method	Reduce awards by type/sou				
Financial Aid Type	Loan	Source	Institutnl		
<input checked="" type="checkbox"/> Reduce/Cancel disbursed amount					

Example of the Repackaging Plan page with multiple decrease rules (2 of 2)

In this example, students who meet the criteria defined in the FAPDDECTEST equation are evaluated for a decrease in funding, first by Federal overaward and then by Federal overaward COA. The process evaluates federal loans before institutional loans. Any disbursed amounts are ignored.

This table lists the Decrease parameters and describes each:

Parameter	Description
Need Threshold and Tolerance	Set the target need to be evaluated to a Need Threshold: <i>Federal overaward</i> , <i>Federal overaward COA</i> , <i>Institution overaward</i> , or <i>Institution overaward COA</i> . Establish a threshold amount in the Tolerance field. For example, you could evaluate all students who have an overaward of at least 1 USD.
Method	<p>If you select <i>Item Type</i>, you must select an Item Type name.</p> <p>If you select <i>Reduce awards by type/source</i>, you can enter a type, a source, or both.</p> <p>Select <i>Bottom Up</i> to reduce the student's package by the overaward amount beginning with the highest sequenced award</p>

Parameter	Description
Reduce/Cancel disbursed amount	Overrides the Disbursement Protection attribute on Financial Aid Item Type Set Up. Use this value if you want to reduce or cancel award amounts below the disbursed amounts.

Validate Item Type Rule

Access the Repackaging Plan page and select *Validate item type* for the repackaging rule.

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2007
Academic Career: UGRD Undergraduate **Repackaging Plan ID:** PELL_ONLY

Find First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status:** Active ***Processing Order:** 203 Copy

***Description:** PELL ONLY **Short Description:** PELL_ONLY

***Award Period:** Both **Selection Criteria:** FAPDPELLELIG [Equation Detail](#)

FM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need FM:** 100.0
IM Need Target: ☐ Constant ☐ Equation ☒ Percent **% Need IM:** 100.0

Repackaging Rule

Find | View All First 1 of 1 Last

Rule Nbr 1

Repackaging Rule Validate item type

Method Item Type

Item Type 900000000100 [Federal Pell Grant](#)

Limited by

☒ **Validate remainder of package**
☐ **Reduce/Cancel disbursed amount**

Example of the Validate item type rule with an Item Type method

In this example, students are reevaluated for eligibility for the Federal Pell Grant. After the Pell Grant is adjusted as needed, the remainder of the package is reevaluated.

This table lists the appropriate parameters and describes each one:

Parameter	Description
Validate remainder of package	The system works from that point in the repackaging plan of the Validated Item Type rule down through the package.

Parameter	Description
Reduce/Cancel disbursed amount	Overrides the Disbursement Protection attribute on Financial Aid Item Type Set Up. Use this check box if you want to reduce or cancel award amounts below the disbursed amounts.

Multirule Plan to Validate the Entire Package

Access the Repackaging Plan page (Set Up SACR, Product Related, Financial Aid, Awards, Repackaging Plan, Repackaging Plan).

Repackaging Plan

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate

Aid Year: 2007
Repackaging Plan ID: VALITENTIR

Find First 1 of 1 Last

***Effective Date:** 01/01/1900

***Status:** Active

***Processing Order:** 219

Copy

***Description:** RPKG: Validate ItemType Entire

Short Description: VALITENTIR

***Award Period:** Both

Selection Criteria: FAPD_VAL_IT
 [Equation Detail](#)

FM Need Target:
☐ Constant
 ☐ Equation
 ☒ Percent

% Need FM: 100.0

IM Need Target:
☐ Constant
 ☐ Equation
 ☒ Percent

% Need IM: 100.0

Repackaging Rule

Find View 1 First 1-4 of 4 Last

Rule Nbr 1

Repackaging Rule Validate item type

Method Item Type

Item Type 9000000000100
 [Federal Pell Grant](#)

Limited by

☐ Validate remainder of package

☐ Reduce/Cancel disbursed amount

Example of a multiple-rule Repackaging Plan page (1 of 2)

Rule Nbr	2				+ -
Repackaging Rule	Validate entire package				
	<input type="checkbox"/> Reduce/Cancel disbursed amount				
<hr/>					
Rule Nbr	3				+ -
Repackaging Rule	Increase				
Need Threshold	Federal unmet need	Tolerance	500.00		
Method	Item Type				
Item Type	900000000703	Sequence	After need based award		
Repackaging Scholarship					
Minimum:	<input checked="" type="radio"/> Constant	<input type="radio"/> Equation	10.00		
Maximum:	<input checked="" type="radio"/> Constant	<input type="radio"/> Equation	5,000.00		
<hr/>					
Rule Nbr	4				+ -
Repackaging Rule	Decrease				
Need Threshold	Federal overaward	Tolerance			
Method	Bottom-up Reduction				
	<input type="checkbox"/> Reduce/Cancel disbursed amount				

Example of a multiple-rule Repackaging Plan page (2 of 2)

A plan that validates students against their entire package should first validate Pell Grants, then recheck for eligibility, and finally account for overawards because locked awards won't be reduced. That is:

- Rule 1: Validate item type. Specify the item type for Pell Grant to reevaluate the student for a Pell Grant. Based on eligibility criteria, the student might be eligible for the same amount, a higher amount, or a lower amount.
- Rule 2: Validate entire package. This rule checks the student's eligibility and federal need.
- Rule 3: Increase using an item type. This rule ensures that any student who lost a Pell Grant and thereby gained unmet need or who otherwise still had up to 500 USD of unmet need could be evaluated for a Repackaging Scholarship between 10 and 5,000 USD.
- Rule 4: Decrease. Specify the need threshold as Federal overaward and use the bottom-up method. If the student has gained (more) Pell Grant eligibility and, as a result, created an overaward condition, then this rule reduces other awards until the overaward condition is removed. Reduction starts from the bottom up, that is, from the highest sequenced award to the lowest.

Setting Up Repackaging Processing

Before using the Repackaging process:

- Set up context definition.
- Set up selection mapping.
- Set up a Population Selection PS Query for Need Summary Validation with bind record SFA_BNSV_BIND.
- Set up a Population Selection PS Query for Repackaging with bind record SFA_BRPKGX_BIND or SFA_BRPKG_BIND.
- Define an Equation for Repackaging Population Selection. Define two equations, the first with an application prompt: Fin Aid Packaging Select Eqtns (A_SELECT); and the second with an application prompt: Batch Repackaging Selection (A_SELECT).
- Set up a Population Selection Equation for Repackaging with application prompt: Batch Repackaging Selection.

This section discusses how to:

- Define the context for a repackaging PS Query.
- Set up a population selection PS Query for repackaging.
- Set up a batch repackaging selection using equations.

Pages Used to Set Up Repackaging Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Context Definition	SCCPS_CNTXT_DFN	Set Up SACR, System Administration, Utilities, Population Selection, Context Definition, Context Definition	Define the context for a Repackaging PS Query.
Selection Mapping	SCCPS_CNTXT_MAP	Set Up SACR, System Administration, Utilities, Population Selection, Context Definition, Selection Mapping	Set up population criteria in a PS Query for Repackaging.

Defining the Context for a Repackaging PS Query

Access the Context Definition page (Set Up SACR, System Administration, Utilities, Population Selection, Context Definition, Context Definition).

Context Definition

Selection Mapping

*Context Name

Batch Repackaging Selection

Process Type

Application Engine

Process Name

SFA_RPKGSEL


Description



Batch Repackaging Selection

*Status


Active







Applicable Menu Navigation

Customize | Find |  First 1 of 1 Last

	*Menu Name	*Component Name		
1	PACKAGE_AID	SFA_RUN_RPKG_SEL		

Applicable Selection Tools

Customize | Find |  First 1-3 of 3 Last

	Selection Tool	Description	Full Access	Exception		
1	PS Query	PeopleSoft Query Manager	<input checked="" type="checkbox"/>	Exception		
2	Equation Engine	Student Administration Equation Engine	<input checked="" type="checkbox"/>	Exception		
3	External File	Student Administration File Parser	<input checked="" type="checkbox"/>	Exception		

Context Definition page

Setting Up a Population Selection PS Query for Repackaging

Access the Selection Mapping page (Set Up SACR, System Administration, Utilities, Population Selection, Context Definition, Selection Mapping).

Context Definition
Selection Mapping

Context NameBatch Repackaging Selection
StatusActive

Pop Selection Integration

☐ Context varies per Application Data

Process Required FieldsFind | View AllFirst1 of 1Last

Results RecordSFA_BRPKG_TRGTPopSelect Repackaging Target
Required Fields RecordSFA_BRPKG_BINDPop Select Repackaging Bind

Data Source RecordsCustomize | Find | View All | First1-2 of 2Last

	*Record (Table) Name	Record Description		
1	SFA_BRPKGX_BIND	Pop Select RPKG No Career Bind	+	-
2	SFA_BRPKG_BIND	Pop Select Repackaging Bind	+	-

☒ Validate Edit Prompt Values

Required Fields MappingCustomize | Find | View All | First1-6 of 6Last

Mapping Information

	Results Record Fields	*Mapping Action	Required Fields
1	ACAD_CAREER	Direct	ACAD_CAREER
2	AID_YEAR	Direct	AID_YEAR
3	EMPLID	Direct	EMPLID
4	INSTITUTION	Direct	INSTITUTION
5	PROCESS_INSTANCE	Process Instance	
6	SEQ_NBR	Sequence	

Selection Mapping page

For a PS Query for repackaging, include INSTITUTION and AID_YEAR as part of the criteria to be used by the Repackaging run control. Your query must include one of the following bind variables:

- *SFA_BRPKGX_BIND*, which does not require a career. Use if your query is not career-dependent.
- *SFA_BRPKG_BIND*, which requires a career. Use if your query is career-dependent.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Using the Population Selection Process"

Setting Up a Batch Repackaging Selection Using Equations

You can set up an equation for batch Repackaging selection in the same way that you set up a population selection PS Query.

Set up any required fields on the equation before using it to select students for batch repackaging. Create two equations, the first with an application prompt: **Fin Aid Packaging Select Eqtns (A_SELECT)**; and the second with an application prompt: **Batch Repackaging Selection (A_SELECT)**. The second equation has a **CHOOSE EQUATION** command that identifies the first equation. By including this **CHOOSE** instruction and specifying the application prompt as **Batch Repackaging Selection**, you can then select it for **Batch Repackaging Population Selection**.

Chapter 10

Setting Up CommonLine 4 Loans

This chapter provides prerequisites and discusses how to:

- Set up loan participants.
- Set up loan types.
- Set up loan validation edits.
- Select equations for the hold and release process.
- Create loan destinations.
- Specify loan processes.
- Set up loan origination.
- Set up process demographic data.
- Set up electronic data interchange (EDI).
- Review loan action codes.

Prerequisites

Before you can set up CommonLine 4 loans, you must define general financial aid processing defaults. On the Financial Aid Defaults page (INSTALLATION_FA), select the FFELP Serial MPN Activation (federal family educational loan program serial master promissory note activation) check box in the Activation Indicators group box if your school participates in serial MPN processing.

See Also

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13

Setting Up Loan Participants

To set up loan participants, use the Maintain Lender Codes component (LENDER_LOAD_MAINT), Define School Lenders component (LOAN_LENDER_TABLE), Maintain Guarantor Codes component (GUAR_LOAD_MAINT), Define School Guarantors component (LOAN_GUAR_TABLE), Maintain Loan Servicer Codes component (SRVCR_LOAD_MAINT), and Define School Servicers component (LOAN_SERVICE_TABLE).

This section provides an overview and discusses how to:

- Add or update lender information.
- Identify lenders as loan participants.
- Update guarantor information.
- Identify guarantors as loan participants.
- Add or update servicer information.
- Identify servicers as loan participants.

Note. You must enter all loan servicers in both CommonLine 4 setup components and Common Record CommonLine (CRC) setup components until loan servicers transition from CommonLine 4 to the newer CRC protocol.

Understanding Loan Participants

Participants in the loan process include lenders, guarantors, and loan servicers. To streamline the loan process, identify all loan participants and understand their electronic loan processing requirements and agreements with your institution. The loan participants tables are not institution or aid-year specific.

Pages Used to Set Up Loan Participants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Lender Load Maintenance	LENDER_LOAD_MAINT	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Lender Codes, Lender Load Maintenance	View, update, or add lender information for your institution. This page is the main repository of lender information maintained by the institution.
Lender Electronic Address	(search)	Click the Electronic Address link on the Lender Load Maintenance page.	View or enter the mailbox type (internet or private communication network) and mailbox ID (internet address).

Page Name	Definition Name	Navigation	Usage
Lender Contact Information	LNDR_LD_CNT_SEC	Click the Contact Address link on the Lender Load Maintenance page.	View or update additional information about lender contacts.
Edit Address	OE_ADDR_USA_SEC	Click the Edit Address link on the Lender Load Maintenance page.	Edit or update address information.
Loan Lender Table	LOAN_LENDER_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Lenders, Loan Lender Table	Add lenders by copying them from the Lender Load Maintenance table. This page contains all lenders from the Lender Load Maintenance table that process loans for your institution.
Lender Electronic Address	(search)	Click the Electronic Address link on the Loan Lender Table page.	Edit or update electronic addresses.
Lender Contact Information	LEND_ADDR_SEC	Click the Contact Information link on the Loan Lender Table page.	Edit or update lender contact information.
Lender Information	LOAN_LENDER_INQ	Financial Aid, Loans, CommonLine Management, View CL4 Lenders, Lender Information	Review lender information.
Guarantor Load Maintenance	GUAR_LOAD_MAINT	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Guarantor Codes, Guarantor Load Maintenance	View, update, or add guarantor information for your institution. This page is the main repository of guarantor information maintained by the institution.
Loan Guarantor Table	LOAN_GUAR_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Guarantors, Loan Guarantor Table	Identify the guarantors that your institution uses for processing loans. You can add guarantors by copying them from the Guarantor Load Maintenance table.
Guarantor Contact Information	GUAR_ADDR_SEC	Click the Contact Address link on the Loan Guarantor Table page.	View or enter additional information about guarantor contacts.
Guarantor Electronic Address	(search)	Click the Electronic Address link on the Loan Guarantor Table page.	Edit or update electronic addresses.

Page Name	Definition Name	Navigation	Usage
Guarantor Contact Information	GUAR_ADDR_SEC	Click the Contact Address link on the Loan Guarantor Table page.	Edit or update guarantor contact information.
Servicer Load Maintenance	SRVCR_LOAD_MAINT	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Loan Servicer Codes, Servicer Loan Maintenance	View, update, or add servicer information for your institution. This page is the main repository of servicer information maintained by the institution.
Loan Servicer Table	LOAN_SERVICE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Servicers, Loan Servicer Table	Identify the servicers that your institution uses for processing loans and add new servicers. You can add servicers by copying them from the Servicer Load Maintenance table.
Servicer Electronic Address	(search)	Click the Electronic Address link on the Loan Servicer Table page.	Edit or update electronic addresses.
Servicer Contact Information	SERV_ADDR_SEC	Click the Contact Information link on the Loan Servicer Table page.	Edit or update servicer contact information.
Servicer Information	LOAN_SERVICE_INQ	Financial Aid, Loans, CommonLine Management, View CL4 Loan Servicers, Servicer Information	Review information about the loan servicers that you set up on the Loan Servicer Table page.

Adding or Updating Lender Information

Access the Lender Load Maintenance page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Lender Codes, Lender Load Maintenance).

Lender Load Maintenance

Lender OE Code:800258Lender OE Branch:0000*Description:1st Natl. BankShort Description:1st Natl.

Address Information

Country:USAUnited States

Address:P.O. Box 130
Siloam Springs, AR 72761

Edit Address

Electronic Address

Contact Information

Find | View AllFirst1 of 1Last

Contact Nbr:1Name:O'Leary,Carolyn

Title:Loan Operations ManagerFunc Area:FA

Contact Address

Lender Load Maintenance page

- Edit Address

Click to edit or update an address.
- Electronic Address



Click to edit or update an electronic address.
- Contact Address

Click to edit or update a contact address.

Identifying Lenders as Loan Participants


Access the Loan Lender Table page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Lenders, Loan Lender Table).

Loan Lender Table

Lender ID	Lender OE Code	*Description	Short Desc	DUNS ID
1	888888  0000 	First Bank	First Bank	

Address Information

Country:

USA  United States

Address:



625 Ozone Avenue
Suite 1100
Venice, CA 98999-1234

[Edit Address](#)

[Electronic Address](#)

Contact Information

Find | View All



First  1 of 1  Last

Cntact Nbr:

1

Name:

Rubio,Robert

Title:

Group Operations Manager

Func Area:

FA

[Contact Address](#)

Loan Lender Table page

- Lender ID**

Displays the ID assigned by the system to the lender associated with the loan.
- Lender OE Code** (lender office of education code)

Select a lender office of education code. When you select a lender office of education code, the system uses data from the lender load maintenance database and automatically populates the rest of the information.

To add a lender to the Lender Load Maintenance table, complete the fields manually.

Updating Guarantor Information

Access the Guarantor Load Maintenance page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Guarantor Codes, Guarantor Load Maintenance).

Guarantor Load Maintenance

Guarantor OE Code:

705

Description:

Student Loan Guarantee Found

Short Description:

SLGFA

Address Information

Country:

USA

United States

Address:

219 So. Victory
Little Rock, AR 72201-1884

Edit Address

Mailbox ID:

Mailbox Type:

Guarantor Load Maintenance page

Mailbox ID

Enter mailbox identification. The mailbox ID is the address where data files are sent when the files are transmitted using the internet or a private communication network.

Mailbox Type

Select an internet provider or communication network.

Identifying Guarantors as Loan Participants

Access the Loan Guarantor Table page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Guarantors, Loan Guarantor Table).

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Loan Guarantor Table

Guar ID	OE Cd	Description	Short Desc	DUNS ID
1	321	Guarantor Services	Guar Svcs	

Address Information

Country:

USA

United States

Address:

1800 Mission Blvd
Suite 6
Mission Hills, CA 91345-0000

Edit Address

Electronic Address

Contact Information

Find | View All First 1 of 1 Last

*Ctact Nbr:

1

Name:

Title:

Func Area:

Contact Address



Loan Guarantor Table page

To add new guarantors, you must first define them on the Guarantor Load Maintenance page.

Guar ID (guarantor identification)	Displays the number assigned by the system to identify the guarantor for loan processing. The system delivers the majority of guarantor codes.
OE Cd (office of education code)	Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Guarantor Load Maintenance table.
Edit Address	Click to update or review address information.
Electronic Address	Click to update or review electronic address information.
Contact Address	Click to update or review contact address information.

Adding or Updating Servicer Information

Access the Servicer Load Maintenance page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Loan Servicer Codes, Servicer Loan Maintenance).

Servicer Load Maintenance			
Destination OE Code	Branch	Description	Short Description
001318	0000	SallieMae	SallieMae
Address Information			
Country:	USA  United States		
Address:	SallieMae Way 130303 Virginia Blvd test Reston, VA 22079		Edit Address
Mailbox ID:	340.2344.33423.0	Lead Time	3
*Mailbox Type:	I  Internet		

Servicer Load Maintenance page

Destination OE Code (destination office of education code) Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Guarantor Load Maintenance table.

Lead Time Enter the number of days prior to the first disbursement date that changes can still be made to the student's loan before the data is sent to the school. This is for information purposes only.

Edit Address Click to update or review address information.

Identifying Servicers as Loan Participants

Access the Loan Servicer Table page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Define School Servicers, Loan Servicer Table).

Loan Servicer Table						
Servicer ID	OE Cd	Branch	Description	Short Desc	Proc Lead Time	DUNS ID
10	001318	0000	SallieMae	SallieMae	3 DAYS	

Address Information

Country: United States
Address: [Edit Address](#)
[Electronic Address](#)

Contact Information

Find | View All First 1 of 1 Last
+ -
Contact Nbr: Name:
Title: Func Area: [Contact Address](#)

Loan Servicer Table page

Servicer ID (servicer identification)	Displays the number used to identify the servicer associated with the requested loan.
OE Cd (office of education code)	Select an office of education code. When you select an office of education code, the system automatically populates the rest of the fields with information from the Servicer Load Maintenance table.
Proc Lead Time (process lead time)	Enter the number of days that a loan destination needs to freeze its data to prepare for a transfer to the school. For example, if the lead time is five days, changes can be made to the student's loan only five days prior to the first disbursement.
Edit Address	Click to update or review address information.
Electronic Address	Click to update or review electronic address information.
Contact Address	Click to update or review contact address information.

To add a servicer that is not included on the Servicer Load Maintenance table, complete the fields manually.

Setting Up Loan Types

To set up loan types, use the Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- Define loan types.
- Link CommonLine loan types with National Student Loan Data System (NSLDS) loan history information.
- Assign loan checklists.

Pages Used to Set Up Loan Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Type Table	LOAN_TYPE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table	Define the types of loans that your institution uses in the loan origination processes.
CommonLine/NSLDS Xref	LOAN_TYPE_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, CommonLine/NSLDS Xref	Link loan types defined for CommonLine processing with the borrower's loans reported by the NSLDS.
Checklist Setup	LOAN_TYPE_DOCUMENT	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup	Assign a checklist to be generated when a loan is originated.

Defining Loan Types

Access the Loan Type Table page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table).

Loan Type Table		CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup
Aid Year:	2007 Financial Aid Year 2006 - 2007		Academic Institution: PSUNV	
Loan Type:	FFEL	Description: FFEL Stafford (Qtr)	Short Description: FFEL_STAF	
Processing		Requirements		
Loan Category:	Sub/Unsub	<input type="checkbox"/> Loan References Required	Nbr Ref Rq:	Loan Fee Rate: %
Loan Program:	FFELP	<input type="checkbox"/> Credit Check Required		*Max Nbr Disbs: 20
Loan Refund Indicator:	Borrower	<input type="checkbox"/> Loan Cosigner Required	Nbr Csg Rq:	Min Loan Amt: 1
		Cosigner Required Amt: \$0		
Loan Item Types Find First 1 of 2 Last				
*SetID: PSUNV *Item Type: 900000000378 Subsidized Stafford - Quarter				
Loan Fees Customize Find View All First 1-2 of 2 Last				
Loan Fee	Description	Ln Fee Amt	Loan Fee Type	Ln Fee Pct
GR1	FFEL Guarantee		P Processing	1.00
OR1	FFEL Origination		P Processing	2.97

Loan Type Table page

When you set up a loan financial aid item type, you include specific conditions for processing the loan. You must complete the Loan Type Table page to complete the setup.

Processing

Loan Category

Select from *Alt Loan* (alternative loan), *PLUS*, *Sub/Unsub* (subsidized/unsubsidized), *Subsidized*, and *Unsubsidized*. If you select *PLUS*, a Graduate PLUS Indicator check box displays. Select the check box for Grad PLUS loans.

Loan Program

Select from *Alternative*, *Direct*, *FFELP*, *Health*, *Perkins*, *State*, and *University*.

For example, to set up Stafford loans processed through CommonLine, you might specify the loan category as Sub/Unsub and the loan program as FFELP. To set up an alternative loan program processed through CommonLine, specify the loan category as *Alt Loan* (alternative loan), and the loan program as *Alternative*.

Loan Refund Indicator

Select from:

Borrower: Select to have the borrower of the loan receive any refunds or overage. For example, the borrower would be a parent or guardian for a PLUS loan.

Student: Select to have the student to receive any refunds from the loan.

You can override this field at the loan application level. Note that additional setup is required in Student Financials to generate refunds to the proper recipient.

Requirements

The system enforces the selected requirements during loan validation when utilizing the corresponding loan edit.

Loan References Required	Enter reference information on the Promissory Note Plus and Promissory Note Alt pages and Loan Origination components (SFA_CRC_ORIG). Enter the number of references required in the Nbr Ref Rq (number of references required) field.
Loan Cosigner Required	If you select this check box, enter the number of cosigners required in the Nbr Csg Rq (number cosigners required) field.
Cosigner Required Amount	Enter the minimum loan amount that requires a cosigner. Enter cosigner information on the Promissory Note Plus and Promissory Note Alt pages and Loan Origination components (SFA_CRC_ORIG). Note that this requirement is enforced by the loan servicer and not the loan validation process.
Loan Fee Rate	Enter the loan fee rate to print on the promissory note for this loan type. Ensure that the loan fee rate matches the loan fee setup for the item type that you associate with this loan type.

Loan Item Types

SetID	Select a setID and an item type. You can associate multiple item types with the same loan type. You cannot share item types across multiple loan types. For example, to define FFELP Stafford loans, enter the subsidized and unsubsidized item types.
--------------	--

Note. Based on the business processes defined by your institution, you might need to create multiple loan types for the same loan program.

The system displays the loan fee, description, loan fee amount, loan fee type, and loan fee percent for the item type selected. These values are associated with the item type when you set up the financial aid item type on the Loan Fee Table page.

See Also

[Chapter 5, "Setting Up Packaging Basics," Attaching Loan Fees, page 129](#)

Linking CommonLine Loan Types to NSLDS Loan History Information

Access the CommonLine/NSLDS Xref page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, CommonLine/NSLDS Xref).

Loan Type Table		CommonLine/NSLDS Xref		Direct Loan Options	Checklist Setup
Aid Year:	2007	Financial Aid Year 2006 - 2007		Academic Institution:	PSUNV
Loan Type	FFEL	FFEL Stafford (Qtr)			
Loan Program:	FFELP	Loan Category:		Sub/Unsub	
Valid CommonLine Codes					
Alternative Loan Type Cd: <input type="text"/>					
Valid NSLDS Codes					
Find View All First Last					
NSLDS Loan Type:	<input type="text" value="SF"/>		Stafford		

CommonLine/NSLDS Xref page

When you originate a CommonLine loan, the system uses the information set up on this page to search for similar loans in the borrower's NSLDS history. If a prior loan is found, the system uses the prior loan information to derive the new loan's destination. This optional feature can be set up in the Loan Institution setup page.

Alternative Loan Type Cd (alternative loan type code) The system uses this code to notify loan agencies about the type of alternative loan. Alternative loan codes are assigned by NCHELP.

NSLDS Loan Type Select a loan type to translate the NSLDS loan type that is defined in the NSLDS tables.

See Also

<http://www.nchelp.org/committees/index.cfm>

Assigning Loan Checklists

Access the Checklist Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup).

Loan Type Table	CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup
Aid Year:	2005 Financial Aid Year 2004-2005	Academic Institution:	PSUNV
Loan Type:	FFEL FFEL Stafford (Qtr)	Checklist:	FFELP FFELP P Nt
Loan Program:	FFELP	Loan Category:	Sub/Unsub

Checklist Setup page

The values for the Loan Type, Loan Program, and Loan Ctgr (loan category) fields are based on the aid year and academic institution that you selected to access the page.

Checklist

Select a checklist to be generated at the time the loan is originated.

Note. The system does not generate checklists for direct loans during origination. It generates checklists after you run the promissory note process.

Setting Up Loan Validation Edits

To set up loan validation edits, use the Maintain Loan Edits component (LN_EDITS) and Create Loan Edit Set component (LN_EDIT_DFLT).

This section provides an overview and discusses how to:

- Define validation edit messages.
- Create loan validation edit sets.

See Also

Equation Engine Programmer's Guide, PDF distributed with the PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook

Understanding Loan Validation Edits

Loan edits verify that the loan origination data is valid for transmission to the receiving loan agency. All CommonLine 4 loan validation edits must be defined in the Loan Edits/Message Table page. Financial Aid delivers a core set of edits to be used during loan validation. All CommonLine 4 loan edits are equations written using the Equation Engine. You can use the Equation Engine to create or modify equations to support loan agencies that are not defined as a CommonLine standard.

Pages Used to Set Up Loan Validation Edits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Edits/Messages	LN_EDIT_TBL	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Loan Edits Loan Edits/Messages	View delivered edits and error messages used in loan validation. You must correct all loan errors before loan data can be selected for outbound processing. You can modify the message text.
Loan Edit Defaults	LN_EDIT_DFLT	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Edit Sets, Loan Edit Defaults	Create loan validation edit sets that are used when constructing loan destination profile records. Loan edit default sets are logical sets of edits that can be carried out based on aid year, loan program, loan category and process level. After they are added to a loan destination, you can further modify the edit sets to function according to the loan destination's business rules.

Defining Validation Edit Messages

Access the Loan Edits/Messages page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Maintain Loan Edits Loan Edits/Messages).

Loan Edits/Messages

Aid Year: 2005 **Financial Aid Year** 2004-2005

Find | View All First 1-4 of 25 Last

Equation:	FAEDADDR01	Permanent address missing	ADDR01	+ -
Edit Error Msg:	Permanent address missing			
Equation:	FAEDADDR02	Mailing address missing	ADDR02	+ -
Edit Error Msg:	Mailing address missing			
Equation:	FAEDADDR03	Borrower perm address missing	ADDR03	+ -
Edit Error Msg:	Borrower perm address missing			
Equation:	FAEDADDR04	Borrower mailing addr missing	ADDR04	+ -
Edit Error Msg:	Borrower mailing addr missing			

Loan Edits/Messages page

This page comes preloaded with updated edit error messages as needed. New loan edits created with the Equation Engine must be added to this page for the loan validation process to use them. Use the Equation field to select an Equation Engine equation.

The Loan Orig Edit Errors (loan origination edit errors) page in the Originate Loan component displays any edit errors encountered during the loan origination process.

This table describes the predefined errors:

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FAEDADDR01	Permanent address missing.	Used for alternative/PLUS loans. A valid permanent address cannot be found for the student. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FAEDADDR02	Mailing address missing.	Used for alternative/PLUS loans. A valid mailing address cannot be found for the student. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.
FAEDADDR03	Borrower perm address missing.	A valid permanent address cannot be found for the borrower. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address to the borrow ID that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FAEDADDR04	Borrower mail address missing.	A valid mailing address cannot be found. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.
FAEDBORROW01	Loan borrower not defined.	Used for alternative/PLUS loans. The Borrower ID field in the Maintain Originated Loans component (SFA_CRC_ORIG) is blank.	Enter the correct borrower ID.
FAEDCHNG01	Loan increase with undisbursed check.	Used for change transactions. A post-disbursement change transaction is generated and an undisbursed check exists for the loan.	Disburse the funds to the student account or return the funds to the lender.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FAEDCOSIGN01	No cosigners - cosigners required.	Used primarily for alternative loans. If cosigners are required for the loan type, the edit verifies that the required number of cosigners exist in the Relationships page for the student and are assigned to the loan.	Add the missing cosigners in the Relationships page and Maintain Originated Loans component.
FAEDCOSIGN02	Cosigner signature required.	Used primarily for alternative loans. Co-signer signatures have not been entered in the Promissory Note Alt and Promissory Note Plus tracking pages.	Revise the data on the Promissory Note Plus page or the Promissory Note Alt page.
FAEDDEBT01	Total student loan debt required.	Used for alternative loans. The total loan debt on the Originate Loan component is zero, and NSLDS loan history exists.	Update the total loan debt in the Originate Loan component using the Loan Demographic Data page.
FAEDDEPSTAT1	Dependency Status missing.	The student's federal dependency status was missing when the loan was originated.	Use the Loan Demographic Data page to update the dependency status in the Originate Loan component.
FAEDDEST01	Loan destination is zero (missing).	The loan destination is not assigned after the loan has been originated. This edit is always carried out by the loan validation process and cannot be deactivated.	Assign a loan destination in the Loan Origination 1 page.
FAEDDISBDT01	Disbursement more than 90 days after loan period end.	A disbursement date is set for greater than 90 days beyond the loan period end date.	Change the date on the Loan Origination 2 page.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FAEDDISBDT02	Disbursement date earlier than 13 days of loan period start.	The first disbursement precedes the loan period begin date by more than 13 days. This may only be replicated by originating a new loan. An online edit prevents manually creating this situation.	Revise the disbursement date or loan period start date in the Loan Origination 2 page.
FAEDDISBDT03	Disbursement dates must be in chronological order.	Disbursement dates are not in order.	Revise disbursement dates in the Loan Origination 2 page.
FAEDDRVLIC01	Borr DL Number or state missing.	The borrower's driver's license information was incomplete when the loan was originated.	Update the driver's license data in the Driver's License page, and then use the Loan Demographic Data page to update this information in the Originate Loan component.
FAEDGRADDT01	Grad date before loan end date.	The graduation date viewed in the Originate Loan component is before the end of the loan period.	Update the FA Term graduation date (if required), and then use the Loan Demographic Data page to update this graduation date in the Originate Loan component.
FAEDNAME01	Student name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the student's name on the Names page or modify the name usage setting to select one of the student's existing names.
FAEDNAME02	Borrower name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the borrower's name on the Names page or modify the name usage setting to select one of the borrower's existing names.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FAEDPER01	Loan period greater than 1 year.	The loan period defined in the Originate Loan 3 page is more than one year.	Change the loan period dates so that the loan period is less than one year. on the Loan Origination 2 page
FAEDPLUS01	PLUS borrower and student SSN are the same.	A PLUS borrower cannot be the student.	Correct possible invalid relationship defined for the student. Assign a new borrower for the PLUS loan.
FAEDPLUS02	No PLUS for grad students allowed.	The student has a graduate NSLDS level in the FA Term record when the loan is originated.	Cancel the loan if appropriate, or change the student's grade level to an undergraduate in the correct FA Term record. If you change the student's grade level, then you also need to use the Loan Demographic Data page to update it in the Maintain Originated Loans component.
FAEDPLUSMPN	Serial PLUS MPN check.	For PLUS loans. Confirms a prior PLUS loan with the same EmplID, borrower EmplID, and lender in the CommonLine MPN Usage page with the current PLUS loan.	To process serially, modify the loan record by changing the borrower or loan destination so that the borrower and lender match the information in the CommonLine MPN Use page. If the loan should be processed as a new MPN, set the Serial Loan Code field on the Loan Origination 3 page from <i>S</i> to <i>N</i> .
FAEDREFS01	References missing.	The required number of references have not been defined for the student in the Relationships page and have not been assigned to the loan.	Add the missing references in the Relationships page and Maintain Originated Loans component.
FAEDSRVCIN01	Service indicator exists.	An active negative service indicator is assigned to the student.	Remove the service indicator.

Equation	Description	Cause	Resolution
FAEDSSN01	Borrower SSN is blank (PLUS and Alt Loans only).	When the loan was originated, either the borrower was not assigned, or the borrower ID did not have a valid Social Security Number (SSN). A valid SSN has the appropriate country code and a NID type of PR.	Verify that the borrower is assigned in the Originate Loan component. If appropriate, fix the SSN on the Demographic and Address Data component and then import the SSN into the originated loan record using the Loan Demographic Data page.
FAEDSSN02	Student SSN is blank.	When the loan was originated, the student did not have a valid SSN. A valid SSN has the appropriate country code and a NID type of PR.	Revise the SSN on the Demographic and Address Data component and then import the SSN into the originated loan record using the Loan Demographic Data page.

Creating Loan Validation Edit Sets

Access the Loan Edit Defaults page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Edit Sets, Loan Edit Defaults).

Loan Edit Defaults

Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV
Loan Program: FFELP **Loan Category:** Sub/Unsub
Loan Dest Processing Level: School Cert Request

Default Profile Edits
Find | View All
First 1-4 of 5 Last

*Equation Name:	FAEDADDR01	Permanent address missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	
*Equation Name:	FAEDBORROW01	Borrower missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	
*Equation Name:	FAEDDEPSTAT1	Dependency stat missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	
*Equation Name:	FAEDNAME01	Student name missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	

Loan Edit Defaults page

The system uses the edit sets defined on this page when you define loan destination profiles.

Loan Program	Values are: <i>Alternative, Direct Lending, FFELP, Health Professions, State</i> , and <i>University</i> .
Loan Category	Indicates a subsidized, unsubsidized, alternative, or PLUS loan.
Loan Dest Processing Level (loan destination processing levels)	Values are: <i>Direct, Guarantee and Print Appl</i> (application), <i>Print and Guarantee, Guarantee Only, School Certification Request</i> , and <i>Manual</i> .

Default Profile Edits

Define loan edits to use during validation for the selected loan program, category, and destination processing level. In addition to creating new edit sets, you can also add or delete edits, or activate or deactivate existing edits.

Equation Name	Select a predefined edit equation. Edit equations are defined in the Equation Engine and are set up on the Loan Edits/Messages page for use by the loan validation process.
Loan Requirement Status	<p>For each section, indicate one of the following:</p> <p><i>Optional:</i> The selected section is not a requirement for the loan.</p> <p><i>Recommended:</i> The selected section is not a requirement for the loan.</p> <p><i>Required:</i> The selected section is a requirement for the loan.</p> <hr/> <p>Note. The field value does not affect current loan functionality, but is intended to support future business processes.</p> <hr/>
Loan Edit Activated	Select to activate an edit.

Selecting Equations for the Hold and Release Process

To set up equations for the hold and release process, use the Hold and Release Equations component (LN_CLHR_EQ_NAME).

This section describes how to select equations for the hold and release process.

Page Used to Set Equations for Hold and Release

Page Name	Definition Name	Navigation	Usage
Hold/Release Equations	LN_HR_EQ_NAME_PNL	Set Up SACR, Product Related, Financial Aid, Loans, Hold and Release Equations, Hold/Release Equations	Select the equations that you require the hold and release process to use.

Selecting Equations for Hold and Release

Access the Hold/Release Equations page (Set Up SACR, Product Related, Financial Aid, Loans, Hold and Release Equations, Hold/Release Equations).

Hold/Release Equations

Institution:

PSUNV PeopleSoft University

Process Name:

HOLD_REL

Description:

Hold/Release

Equation Name

Find | View All

First 1-2 of 2 Last

*Equation Name	Description	
FAHDLOADLVL	Load Level Status Check	<div>+ -</div>
FAHDSAPSTAT	Satisfactory Academic Progress	<div>+ -</div>

Hold/Release Equations page

The equations that you select on this page form an equation set unique to the specified process name.

On the Set Hold/Release Flag process page, you can specify the set of equations that the CommonLine disbursement hold and release process should use.

- Description

Displays the process for which you are selecting equations.
- Equation Name

Select an equation. The list contains all equations created for the selected institution; select only those equations created specifically for hold and release processing.

If you use the hold and release process at your institution without modifications, create at least one hold and release equation set with the two provided hold and release equations: FAHDLOADLVL (Load Level edit) and FAHDSAPSTAT (Satisfactory Academic Progress check).

Note. When creating equations, follow the equation naming conventions described in the Equation Engine chapter.

Creating Loan Destinations

To set up loan destinations, use the Create Loan Destinations component (LN_DEST_PROFILE).

This section provides an overview and discusses how to:

- Define loan destination profiles.
- Define CommonLine options.
- Define loan destination edits.

Understanding Creating Loan Destinations

Consolidate the loan participants—the lender, guarantor, and servicer—into one entity, the loan destination. The loan destination defines the business characteristics and protocols between a lender, guarantor, and servicer, which enables them to process loans for the school. You must create a loan destination profile for each lender in the FFELP loan program or alternative loan program, and for the direct lending servicer for direct loans.

Pages Used to Create Loan Destinations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Dest Profile (loan destination profile)	LN_DEST_PROFILE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, Loan Dest Profile	Define participants that your institution uses to exchange loan application data. You can designate multiple destinations for a specific loan program.
CommonLine Options	LN_DEST_PROFILE2	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, CommonLine Options	Designate CommonLine options for a loan destination.
Loan Dest Edits (loan destination edits)	LN_DEST_EDITS	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, Loan Dest Edits	Select loan validation edits to be used for the loan destination.

Defining Loan Destination Profiles

Access the Loan Dest Profile page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, Loan Dest Profile).

Loan Dest Profile		CommonLine Options		Loan Dest Edits	
Aid Year: 2005		Financial Aid Year 2004-2005		Institution: PSUNV	
Loan Destination Profile					
Destination:	6	Loan Program:	FFELP	Tolerance:	0.00
Description:	PNC Bank	Short Description:	PNC Bank		
Destination Components				Contact Order	
Guarantor ID:	6	CSAC	OE Cd:	706	Ovrd <input type="checkbox"/>
Lender ID:	70	PNC Bank	OE Cd:	809921	Branch: 0000
Servicer ID:	1	US Lender	OE Cd:	525252	Branch: 0000
Physical Destination:	Guarantor				
				Pre Guarantee Contact: Servicer	
				Pre-Disb Contact: Servicer	
				Post Disb Contact: Servicer	
Valid Category/Process Level					
Loan Category: Sub/Unsub		<input type="checkbox"/> Track PN	Proc. Level: Guarantee and Print Appl		Find View All First 1-2 of 4 Last
Loan Category: Sub/Unsub		<input checked="" type="checkbox"/> Track PN	Proc. Level: Guarantee Only		+ -

Loan Dest Profile page

Normally, a loan destination includes a lender, a guarantor, and a servicer. CommonLine requires that you define at a minimum a guarantor for the destination.

Loan Destination Profile

Loan Program Create a loan destination profile for each participant that receives the physical loan origination files. Select from: *Alternative, FFELP, Health, Perkins, State, and University.*

Tolerance Used for CommonLine 96 loans processing. This field is no longer used for current loan processing.

Description For a FFELP loan, enter a description that best describes the destination.

Destination Components

Guarantor ID, Lender ID, and Servicer ID Select any combination of the guarantor, lender, and servicer, but note that one of them must be the guarantor. This is a CommonLine requirement. Select the Ovrd (override) check box to save the page without designating all three components.

After you select an ID and press TAB to move to the next field. The system displays the office of education code and branch. If you are defining a loan destination for the direct lending loan program, you should only select a servicer ID.

Ovrd (override) Select this check box to be able to save the page without having to designate all three components.

Physical Destination Select the destination to receive the loan application. Values are: *Lender*, *Servicer*, and *Guarantor*.

Contact Order

Pre-Guarantee Contact, Pre-Disbursement Contact, and Post Disbursement Contact Identifies the loan agency that should be contacted based on the state of the student's loan application. Select a guarantor, lender, or servicer. These fields are for information only and are not used by the loan processes.

Valid Category Process Level

Assign the process level when you originate a loan.

Loan Category Identify the loan category that the loan destination processes. Values are: *Alt Loan* (alternative loan), *PLUS*, *Subsidized*, and *Unsub*.

Track PN (track promissory note) Select to indicate how the presence of an application or promissory note determines the process level. The loan origination process checks for an application or promissory note in the Promissory Note Alt, Promissory Note Plus, and CommonLine PNote - Stafford. components. For example, if you are originating a combination Stafford loan (subsidized or unsubsidized) and you have received the promissory note prior to originating the loan, you would select the check box to originate the loan with the process level of Guarantee Only. However, if you are originating without an application or promissory note, you can set *Print and Guarantee* as your process level.

Proc Level (process level) Select the loan processing level that the loan destination performs for the corresponding loan category. Select from:

Direct: Select for direct loans.

Guarantee Only: Select to have the service provider guarantee the loans only.

Guarantee and Print Appl: Select to have the service provider guarantee the loan and print and mail a promissory note to the borrower.

Manual: Select if the borrower wants to use a lender unable to take electronic applications using CommonLine.

Print and Guarantee: Select to have the service provider print and mail a promissory note to the borrower and guarantee the resulting loan after receipt of the promissory note.

School Cert request: Select if the loan destination participates in school certification request processing.

Defining CommonLine Options

Access the CommonLine Options page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, CommonLine Options).

Loan Dest Profile	CommonLine Options	Loan Dest Edits
Aid Year: 2005 Financial Aid Year 2004-2005		Institution: PSUNV
Loan Destination Nbr: 6		Loan Program: FFELP PNC Bank
Change Transaction Destination		
Pre Disbursement Destination: Lender		Destination ID: 70 PNC Bank
Post Disbursement Destination: Lender		Destination ID: 70 PNC Bank
Build Options		
Use CommonLine Version: CL 4		Stafford App Form Default: MPN
<input checked="" type="checkbox"/> Accept Change Records		Serial MPN Process Default: New MPN
<input type="checkbox"/> Create CL Alt @4		Prom Note Delivery Default: Paper
<input type="checkbox"/> Create CL Ref @5		Disb Hold/Release Default: Hold
<input type="checkbox"/> Create CL Ref Sup @7		Funds Return Method Code: EFT

CommonLine Options page

**Pre Disbursement
Destination and Post
Disbursement
Destination**

Designate the loan agency to receive change transaction records when a loan adjustment occurs before or after the receipt of loan funds by the school.

**Use CommonLine
Version**

Select the CommonLine version to indicate the CommonLine application send and change transaction file format to use when creating files for the loan destination. CommonLine version 4 (CL4) is the only valid option for this component.

Accept Change Records

Select to indicate whether the loan destination can receive CommonLine 4 change transaction records. If this check box is clear, the loan origination process adjusts loan eligibility as appropriate, but the system does not generate a CommonLine 4 change transaction record for electronic transmission.

Note. Your school must notify the appropriate lending agency of changes in loan eligibility if a change transaction record cannot be sent using CommonLine procedures.

Create CL Alt @ 4
(create CommonLine
alternative), **Create CL
Ref @ 5** (create
CommonLine reference),
and **Create CL Ref Sup
@ 7** (create CommonLine
reference supplemental)

These check boxes identify optional CommonLine 4 application subrecords. Select to have the CommonLine outbound process build the selected records for all loans of the loan destination. You set up these file build options based on the business processes established between your school and your loan destinations.

Stafford App Form Default (Stafford application form default)	Select the type of Stafford application to use when originating a Stafford loan and when no unused tracked Stafford applications exist. Values are <i>MPN</i> (master promissory note) or <i>Common App</i> (common application). Note that the Stafford MPN is the current acceptable form for Stafford loan processing.
Serial MPN Process Default (serial master promissory note process default)	Select the serial default master promissory note process. Use <i>New MPN</i> for a new master promissory note or <i>Serial MPN</i> for serial loan processing. The default value of this field is set in the Financial Aid Installation Defaults page. You can override the value here. When you originate a Stafford loan for this destination, the system uses this default value. You can also override this setting at the loan origination level by updating the record in the Maintain Originated Loans component prior to the transmission of the loan. You can also control whether individual students can qualify for serial loan processing by updating the student's settings in the Maintain Student MPN Usage component.
Prom Note Delivery Default (promissory note delivery default)	<p>Note. Originating a loan as a serial loan does not result in the loan's rejection if the borrower does not qualify. Refer to the CommonLine 4 version of the <i>NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual</i> for information about the serial loan process.</p> <p>Select how you want promissory notes to be delivered to the borrower. Values are: <i>Email</i>, <i>Paper</i>, and <i>Web</i>.</p> <p>Note. The promissory note delivery method is agreed upon between the school and the loan destination.</p>
Disb Hold/Release Default (disbursement hold/release default)	The system sets this field when a loan is originated. Use this field if you participate in disbursement hold and release processing with your loan destination. The default value is <i>No Support</i> , which means that the hold and release process is not supported by the loan destination. Override the default by selecting <i>Hold</i> or <i>Release</i> . A disbursement hold and release status is set for every disbursement of an originated loan. You can automatically place all disbursements on hold or release status when the loan is originated. As you approach the disbursement date, you can request the disbursements on hold to be released to your school for students who are eligible to be paid. Conversely, you can request disbursements set for release to be placed on hold for students who are not eligible to be paid. Do this by updating the student's hold or release status in the Loan Origination component. Changes to disbursement hold and release status are then communicated to the loan agency through the CommonLine V.4 Change Transaction record.

Funds Return Method Code

Select a code to indicate methods for disbursement of funds. Select from:

Borr Check (borrower check): Individual borrower checks.

EFT (electronic funds transfer): Funds moved electronically from one account to another.

Master Chk (master check): A single check to the school containing the sum of funds for all borrowers that are being disbursed to the same institution on the same day.

Netting: Funds that have been sent to the school electronically are reallocated for disbursement to another eligible borrower instead of being returned. The disbursing agent then deducts the adjusted amount from the total dollar amount on the next transmission of funds to the school.

See Also

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, CommonLine 4 Version

Defining Loan Destination Edits

Access the Loan Dest Edits page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine 4, Create Loan Destinations, Loan Dest Edits).

Loan Dest Profile		CommonLine Options		Loan Dest Edits	
Aid Year:	2005	Financial Aid Year 2004-2005		Institution:	PSUNV
Loan Destination Profile					
Destination:	6	PNC Bank		Loan Program:	FFELP
Default Profile Edits Find First 1 of 4 Last					
Loan Category:	Sub / Unsub		Prom Note Tracking Status: No		
Proc. Level:	Guarantee and Print Appl				
Find View All First 1-2 of 6 Last					
*Equation Name:	FAEDADDR03	Borrower perm address missing + -			
Loan Requirement Status:	Required		<input checked="" type="checkbox"/> Loan Edit Activated		
<hr/>					
*Equation Name:	FAEDDISBDT01	Disb 91 days after Ln Per End + -			
Loan Requirement Status:	Required		<input checked="" type="checkbox"/> Loan Edit Activated		

Loan Dest Edits page

When you define a valid loan category and processing level on the Loan Dest Profile page, it matches those parameters to a default edit profile defined in the Loan Edits Default page and automatically attaches them to the loan destination. Use this page to add, delete, or adjust the default values.

The upper portions of this page display profile information from the Loan Dest Profile page.

Equation Name	Select an equation name for the edit statement. Edit statements are set up on the Loan Edits/Messages page.
Loan Requirement Status	Displays <i>Optional</i> , <i>Recommended</i> , or <i>Required</i> .
Loan Edit Activated	Select to enforce an edit. For example, a loan destination might require a signed promissory note for all loans before the start of the loan period, but might not require one after the loan period begins. If you clear this check box, the system does not look for a signed promissory note in validation.

Specifying Loan Processes

To set up loan institutions, use the Define Loan Institutions component (LOAN_INST_TABLE).

This section discusses how to set up your loan institution by specifying processes and contact information.

Pages Used to Specify Loan Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Institution Table	LOAN_INST_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table	Define how your school processes loans for the academic year. You can define loan processes for each academic career of your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the Institution Address link on the Loan Institution Table page.	Enter address information for each loan institution.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Update the address, mailbox type, and mailbox identification.

Specifying Loan Processes

Access the Loan Institution Table page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table).

Loan Institution Table		Loan Destination Default		
Academic Institution:	PSUNV	PeopleSoft University		
Aid Year:	2005	Financial Aid Year 2004-2005		
School Code	Branch	Description	Short Description	Career
001315	00	PEOPLESOFT UNIVERSITY	PEOPLESOFT	Graduate
Loan Processing Info				
FFELP/Direct Participant:	All Loans	DUNS ID:	123456789	
DL Disclosure Print:	LOC	DL SchCd:	001315	
SSN Source:	CC	COD Common ID:	001315	
Institution Address				
<input checked="" type="checkbox"/> COD Full Participant		<input checked="" type="checkbox"/> DL Serial MPN Activation		<input type="checkbox"/> EDE Special School
Contact Information Find View All First 1 of 1 Last				
Contact Nbr:	1			
Name:	Smythe,Brenda			
Title:	COORDINATOR		Func Area:	LOAN
Loan Institution Contact				

Loan Institution Table page

FFELP/Direct Participant	Select if the loan institution can originate FFELP or direct loans, or both. Alternative loans are not affected by this setting.
DL Disclosure Print (direct lending disclosure print)	For direct lending.
DL SchCd (direct lending school code)	If your institution processes direct loans, enter your direct lending school code. This field is hidden if your school does not participate in the direct lending program.
SSN Source (social security number source)	For direct loan and COD processing. Select the source of the student's Social Security Number, such as from PeopleSoft Enterprise Campus Community Fundamentals.
COD Full Participant	Select if your institution is a full participant for common origination and disbursement.
DL Serial MPN Activation (direct loan serial master promissory note activation)	Select if the loan institution that you are defining uses the direct loan serial master promissory note. This field is hidden if your school does not participate in the direct lending program.
EDE Special School (electronic data express special school)	For direct loans. Select to set an identification prompt on the origination file. This is for schools approved by the Department of Education for special consideration for direct loan processing by the Loan Origination Center (LOC). Usually the default rate for the school must be lower than 10%.
Contact Nbr (contact number)	Enter contact information for each financial aid administrator in charge of loan processing. Assign a contact number for each entry.

Institution Address Click to access the Loan Institution Address Information page.

Loan Institution Contact Click to access the Loan Institution Contact Information page and update the address, mailbox type, and mailbox identification.

Setting Up Loan Origination

To set up a default loan agency, use the Reassign Loan Agencies component (LN_AGENCY_DFLT) and Define Loan Institutions component (LOAN_INST_TABLE).

This section provides an overview of loan origination and discusses how to:

- Specify a default loan agency.
- Set up loan destination defaults.

Understanding Loan Origination

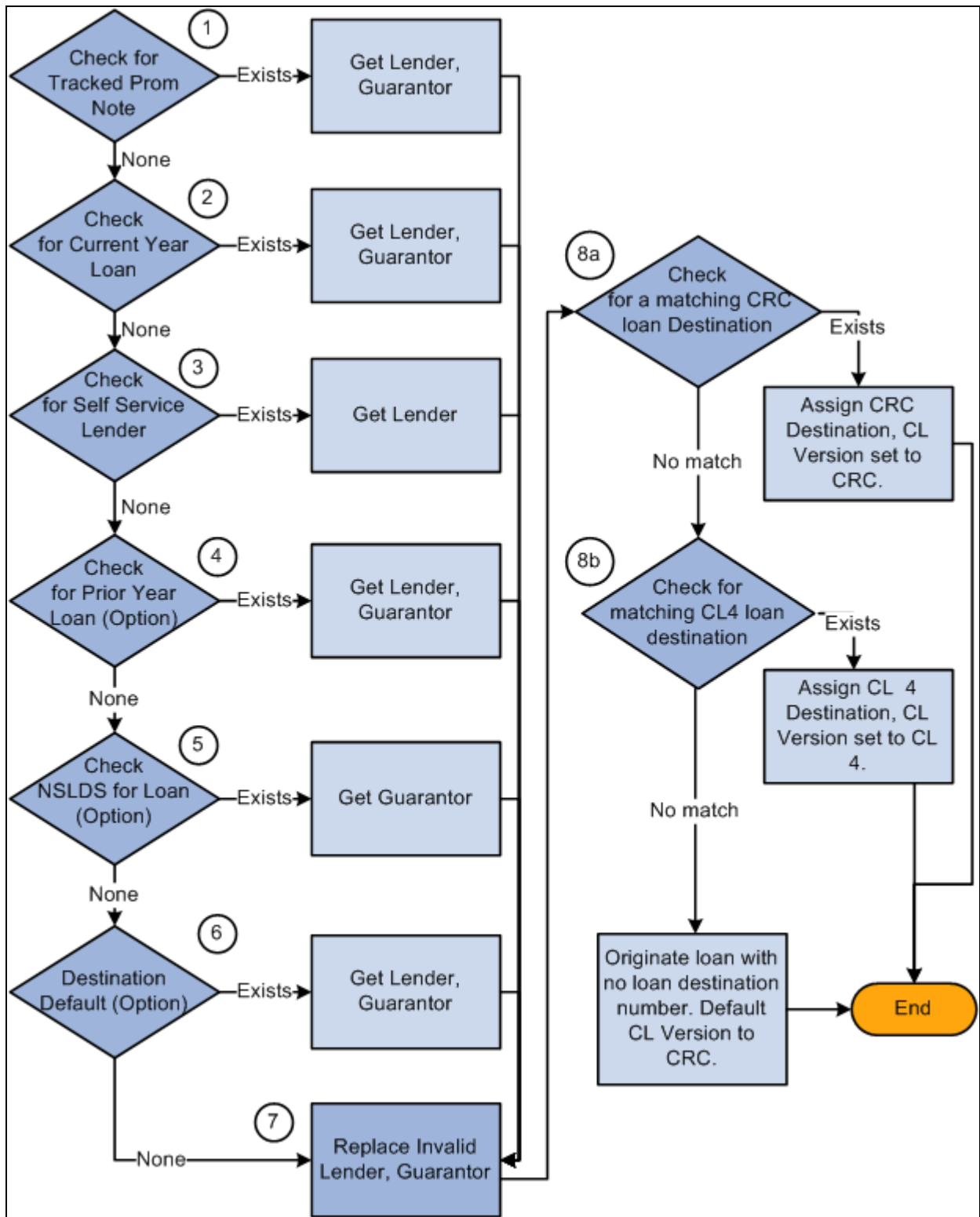
Because CommonLine 4 process levels only require a guarantor to originate a loan, the loan destination that you use to originate the loan might not be the same loan destination that you use to guarantee the loan.

Loan origination follows a seven-step process to determine the lender and guarantor and then determine the loan destination. You determine which steps to follow when you set destination defaults.

Step	What Happens	Possible Information Selected
1	If an active, unused promissory note is tracked, the process selects the designated lender and guarantor from the form used for origination. The process skips steps 2 through 6.	Lender only Guarantor only Lender and guarantor No information
2	If a matching loan is originated and guaranteed in the current aid year for the borrower, the system uses lender and guarantor from the earlier origination record, and the process skips steps 4 through 6.	Lender and guarantor No information
3	If the student has entered a lender from the self-service lender selection pages, the process uses the selected lender and skips steps 4 through 6.	Lender No information
4	The origination process searches back one year for a prior year originated loan of the same loan type; if a prior loan is found, the process skips steps 5 and 6.	Lender and guarantor No information

Step	What Happens	Possible Information Selected
5	<p>The origination process searches the current NSLDS history to find a previously originated loan of the same loan type. A new NSLDS loan type cross reference section is available in the Loan Type Table component to facilitate this step. If a prior loan is found, the process skips step 6.</p> <p>Note. Only the guarantor is used from the NSLDS loan history.</p>	<p>Guarantor only</p> <p>No information</p>
7	The process assigns a default destination	<p>Lender only</p> <p>Guarantor only</p> <p>Lender and guarantor</p> <p>No information</p>
6	The process checks the validity of the selected lender and guarantor values and reassigns lender and guarantor IDs as defined in the Agency Default page.	<p>Lender only</p> <p>Guarantor only</p> <p>Lender and guarantor</p> <p>No information</p>
8	Based on the lender and guarantor information selected in the prior steps, the loan origination process searches for a matching loan destination profile record. If one is not found, the loan is still originated, but it cannot be transmitted until a loan destination is assigned.	<p>Loan destination</p> <p>No destination</p>

The following chart illustrates the process:



Process flow to determine loan destination

Pages Used to Set Up Loan Origination

Page Name	Definition Name	Navigation	Usage
Agency Default Setup	LN_AGENCY_DFLT	Set Up SACR, Product Related, Financial Aid, Loans, Reassign Loan Agencies, Agency Default Setup	Identify a default agency if the borrower does not select a lender, guarantor, or servicer. Identify lenders, guarantors, or servicers that are no longer in service and have them replaced automatically with a new agency when a loan is originated.
Loan Destination Default	LOAN_INST_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default	Set up default parameters for loan destination.

Specifying a Default Loan Agency

Access the Agency Default Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Reassign Loan Agencies, Agency Default Setup).

Agency Default Setup

Aid Year: 2005 Financial Aid Year 2004-2005 **Academic Institution:** PSUNV
Loan Program: FFELP

Loan Agency Default Parameters
Find | View All
First 1 of 1 Last

***Agency Type:** Lender **Nbr:** 1

OPEID: 800720 **Branch ID:** 0000 Bank of America

New OPEID: 800720 **New Branch ID:** 0000 Bank of America

Comments:

CL4 Agency ID:

CL4 New Agency:

Agency Default Setup page

Agency Type Select from: *Guar/Ins* (guarantor/insurer), *Lender*, and *Servicer*.

OPEID (office of postsecondary education identifier)

Select the office of postsecondary education identifier.
To assign a default loan agency, leave this field blank.

New OPEID

Enter the agency to replace the previous agency, or the default agency if you left the OPEID field blank.

Note. The source of values for the OPEID and New OPEID field are defined in the Create CRC Loan Participant component.

CL4 Agency ID

Displays the ID and agency name.

Note. This field displays information only if you recently upgraded from Release 8.0 SP1.

CL4 New Agency

Displays the ID and name for the new agency.

Note. This field displays information only if you recently upgraded from Release 8.0 SP1.

Setting Up Loan Destination Defaults

Access the Loan Destination Default page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default).

Loan Institution Table		Loan Destination Default	
Academic Institution:	PSUNV	PeopleSoft University	
Aid Year:	2007	Financial Aid Year 2006 - 2007	
School Code	Branch	Description	Short Description Career
001315	00	PEOPLESOFT UNIVERSITY	PEOPLESOFT Graduate
Default Loan Destination Parameters Find View All First 1 of 3 Last			
*Loan Program: FFELP			
1. Current Prom Note 2. Current Year Originations 3. Student Selected Lender 4. <input type="checkbox"/> Check Prior Year's Destination 5. <input type="checkbox"/> Check NSLDS for Guarantor 6. Default Destination <input type="checkbox"/> Use CRC Destination <input type="text"/>			

Loan Destination Default page

The order in which the system chooses the loan destination for the student is as follows: Current Promissory Note, Current Year Originations, Check Prior Year Originations, Check NSLDS for Guarantor, Default Destination.

Loan Program	Select from <i>Alternative, Direct, FFELP, Health, Perkins, State, or University</i> .
Current Prom Note (current promissory note), Current Year Originations , and Student Selected Lender	The loan origination process always performs these steps.
Check Prior Year's Origination and Check NSLDS for Guarantor	Select to have the system perform these steps.
Default Destination	If nothing results from the first four search methods, the system uses this default destination. The field allows you to select from the CommonLine 4 loan destination profile numbers. Select the Use CRC Destination (common record commonline destination) check box to allow the selection of CRC loan destination profile numbers.
Use CRC Destination	<p>Select to use CRC destination. This controls the dynamic prompting of either CL4 or CRC loan destinations in the edit box on the page.</p> <ul style="list-style-type: none"> • If you select the check box and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CRC is used. • If you clear the check box and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CL4 is used. <p>Note that a default loan destination number is not required to activate this behavior. The current rule used by the origination process to determine the CL version and loan destination number has not been changed.</p>

Setting Up Process Demographic Data

To set up process demographic data, use the Define Demographic Data Use component (FA_PRCSDemo_TBL), Address Usage Table component (FA_PRCSDemo_TBL), and Name Usage Table component (NAME_USAGE_TABLE).

This section discusses how to set up process demographic data.

Pages Used to Set Up Process Demographic Data


<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Process Demographic Use	FA_PRCSDemo_TBL	Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use	Indicate where to retrieve the student demographic information for loan processing. The loan origination process extracts borrowers' demographic information from Campus Community.
Address Usage	ADDR_USAGE_TABLE	<ul style="list-style-type: none"> Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table, Address Usage Click the Address Usage Table link on the FA Process Demographic Use page. 	Define or review address and email usages by specifying hierarchies of address types to search for and use in a specific usage.
Name Usage Table	NAME_USAGE_TABLE	<ul style="list-style-type: none"> Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table, Name Usage Click the Name Usage Table link on the FA Process Demographic Use page. 	Define name usages to specify the hierarchies of name types that you want to use in a specific usage.
Phone Usage	PHONE_USAGE_TABLE	<ul style="list-style-type: none"> Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table, Phone Usage Click the Phone Usage Table link on the FA Process Demographic Use page. 	Define phone usages to specify the hierarchies of telephone types to search for and use in a specific usage.

Setting Up Process Demographic Data

Access the FA Process Demographic Use page (Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use).

FA Process Demographic Use

Process Demo Setup

Customize | Find | View All |  First 1-3 of 3 Last

	Process Name	Address Usage	Perm Addr Usage	Mail Addr Usage	Name Usage	Phone Usage	Email Usage		
1	Award Notification	SLCT ORD 1			NAME USG 1			+	-
2	ISIR Processing	SLCT ORD 1			NAME USG 1	RPT_PHON	RPT_EMAIL	+	-
3	Loan Processing		SLCT ORD 1	SLCT ORD 2	NAME USG 1			+	-

[Address Usage Table](#)[Name Usage Table](#)[Phone Usage Table](#)

FA Process Demographic Use page

The system displays settings defined in Campus Community setup.

- Address Usage

Use to select the address usage table setting defined in Campus Community for use by the associated process. Not used for loans.
- Perm Addr Usage
(permanent address usage)

Used to select the address usage table settings defined in Campus Community setup to determine the address type.
- Mail Addr Usage (mail address usage)

Used to select the address usage table settings defined in Campus Community setup to determine the address type.
- Name Usage

Used to select the name usage table settings defined in Campus Community setup to determine the name for the associated process. For loans, this is used to select the student and borrower names.
- Phone Usage

Used to select the phone usage table settings defined in Campus Community setup to determine the phone number for the associated process.
- Email Usage

Indicates the type of email address, such as home, business, dorm, or campus. Used to select email usage table settings defined in Campus Community setup for use by the associated process.
- Address Usage Table

Click to access the Address Usage page to define or review address usages.
- Name Usage Table

Click to access the Name Usage page to define or review name usages.
- Phone Usage Table

Click to access the Phone Usage page to define or review phone usages.

Note. Email address usages are defined in the Address Usage Table.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Name Usages

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Address Usages

Setting Up Electronic Data Interchange

To set up electronic data interchange, use the Entity Codes component (EC_ENTITY_CODE_TBL), Define EDI Business Unit component (FA_EDD_DEST), Internal Partners component (EC_INT_PARTNER_DEF), External Partners component (EC_EXT_PARTNER_DEF), Maintain Loan Transfer ID component (LN_XFER_FILE_ID).

This section provides an overview of EDI Manager and describes how to:

- Create electronic data interchange (EDI) entity codes.
- Set up Financial Aid EDI destinations.
- Set up EDI partner profiles.
- Set up profile defaults.
- Set up EDI internal partners.
- Set up EDI external partners.
- Set up loan transfer IDs.

Understanding EDI Manager

You use EDI Manager to set up and maintain data about trading partners and to define data mapping between transaction files and the tables in your database. EDI is a standard means of exchanging data electronically. When you initiate a transaction, the system extracts the transaction data from your database and translates it into a common EDI format. Financial Aid uses EDI Manager to generate files formatted for CommonLine 4 and federal direct lending.

To send records to your trading partners:

1. Run a process to gather the data files that are ready to be transmitted.

The process moves all applicable data to EDI outbound staging tables.

2. Run an EDI Manager process to convert the data to flat files.

To receive records from your trading partners, run an EDI process to deposit the files into EDI inbound staging tables and then run a separate process to move the files into the database.

Pages Used to Set Up Electronic Data Interchange

Page Name	Definition Name	Navigation	Usage
EC Entity Code Tbl (electronic commerce entity code table)	EC_ENTITY_CODE_TBL	PeopleTools, EDI Manager, Set Up Trading Partners, Entity Codes, EC Entity Code Tbl	Create an entity code for an internal trading partner.
Financial Aid EDI Destination	FA_EDIDEST	Set Up SACR, Product Related, Financial Aid, File Management, Define EDI Business Unit, Financial Aid EDI Destination	Create an entity to represent your financial aid business office as an EDI destination. A predefined value of FABU is provided.
Profile Definition	EC_TP_PROFILE_1	PeopleTools, EDI Manager, Define EDI Transactions, Partner Profiles, Profile Definition	Set up EDI partner profiles. Control how outbound files are processed.
Output Message Header/Footer	EC_MESSAGE	Click the Message button on the Profile Definition page.	Designate a message header and footer.
Profile Defaults	EC_TP_PROFILE_2	PeopleTools, EDI Manager, Define EDI Transactions, Partner Profiles, Profile Defaults	Set up your default partner profiles.
EC Int Partner Def (electronic commerce internal partner definition)	EC_INT_PARTNER_DEF	PeopleTools, EDI Manager, Set Up Trading Partners, Internal Partners, Ec Int Partner Def	Set up internal EDI recipients, such as the Financial Aid Office.
EC Ext Partner Def (electronic commerce external partner definition)	EC_EXT_PARTNER_DEF	PeopleTools, EDI Manager, Set Up Trading Partners, External Partners, Ec ExtPartner Def	Set up external EDI trading partners.
Loan Transfer IDs	LN_XFER_ID_UPDT	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs	Set up loan transfer IDs to pass information to EDI Manager for all outbound loan file transactions.
Loan Transfer ID Table	LN_XFER_ID_TBL	Financial Aid, Loans, View Loan Transfer ID Records, Loan Transfer ID Table	View loan transfer IDs and descriptions.

Creating EDI Entity Codes

Access the EC Entity Code Tbl page (PeopleTools, EDI Manager, Set Up Trading Partners, Entity Codes, EC Entity Code Tbl).

The screenshot shows the 'Ec Entity Code Tbl' page. It contains the following fields and controls:

- PeopleSoft Entity Code:** A text field containing the value 'LDST'.
- Description:** A text field containing the value 'Loan Destination'.
- Record (Table) Name:** A text field containing the value 'LN_EDT_DEST_VW' with a magnifying glass icon to its right.
- External Entity:** A checkbox that is checked, followed by the text 'External Entity'.

EC Entity Code Tbl page

Entity codes define the internal and external entities that are involved in the EDI process. For loan processing, external trading partners are the loan destinations, and internal trading partners are the schools.

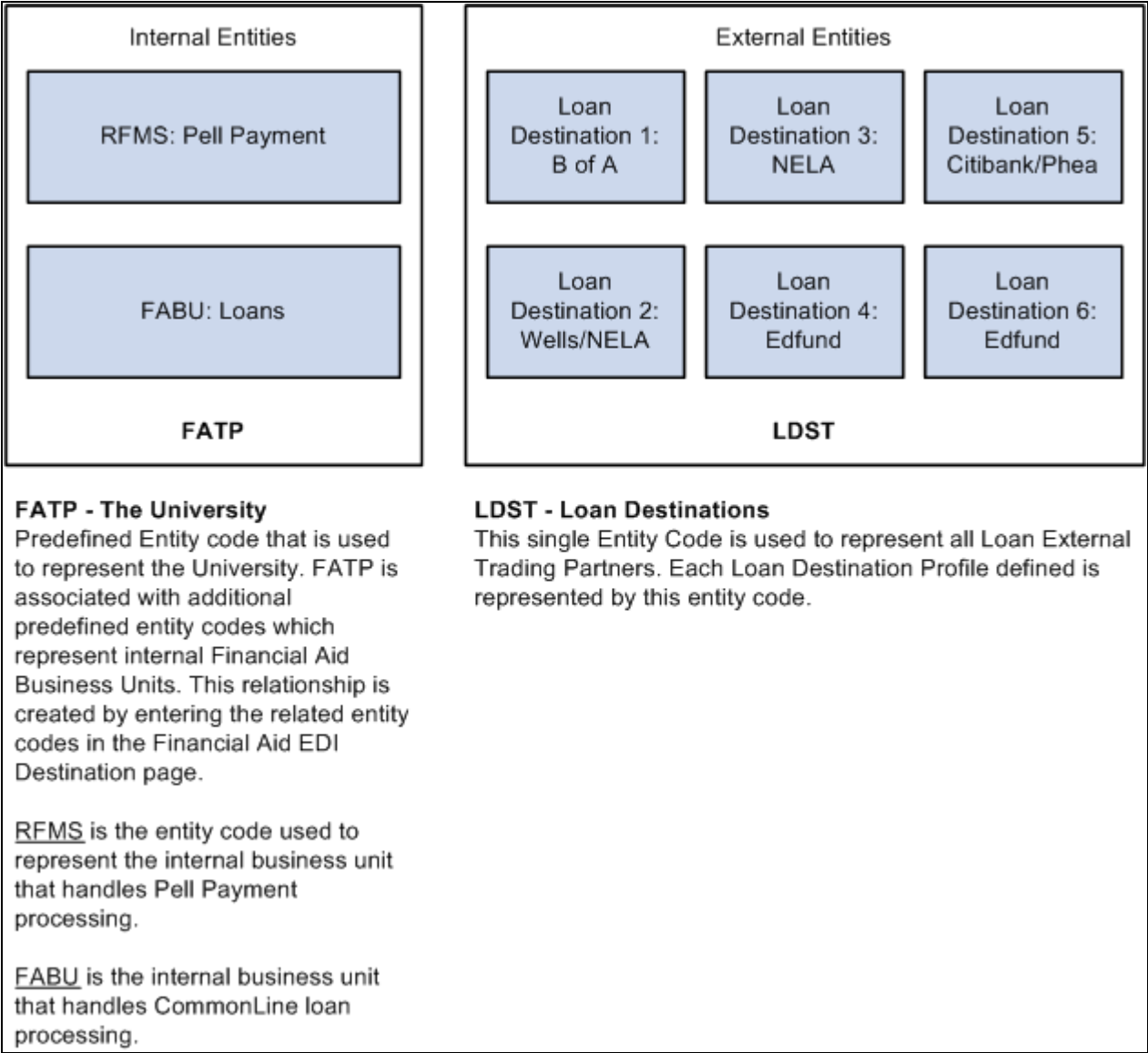
To create an entity code, enter the page in Add mode.

PeopleSoft Entity Code Enter a code to identify external or internal trading partners.

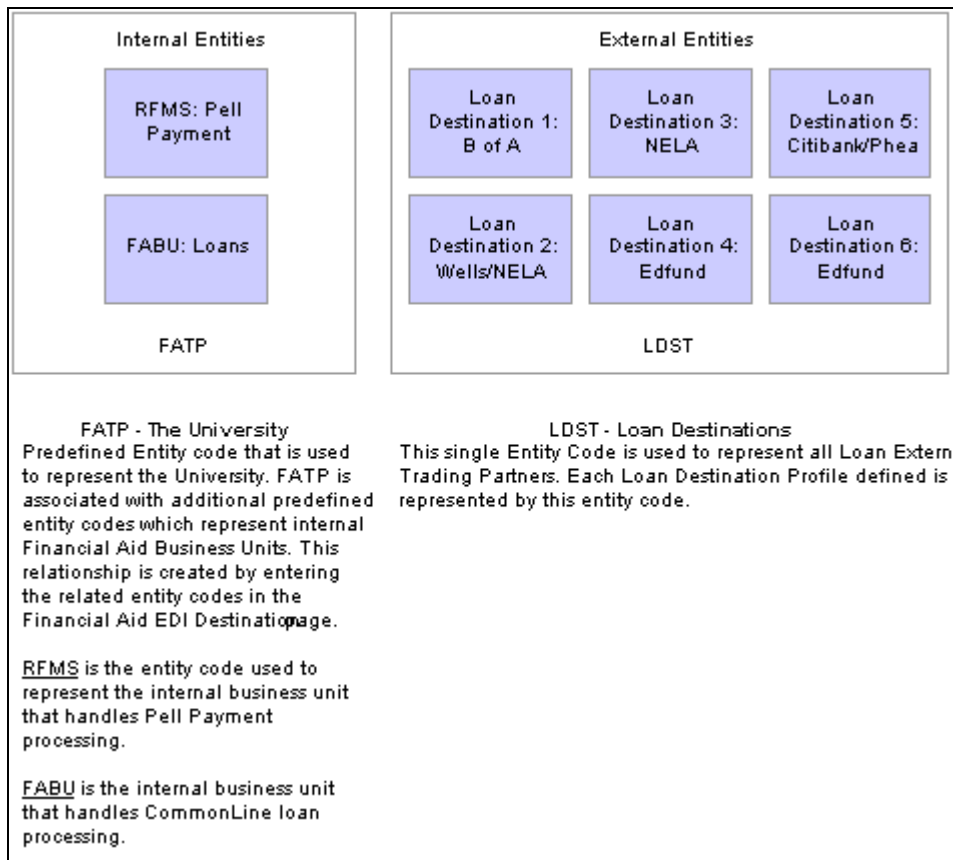
Record (Table) Name Select the table where data for loan participants in the process are located. For loan processing, indicate where the loan destination profile and loan institution information are located. You must create your own database record or view with the appropriate loan trading partners.

External Entity Select if this entity controls external partners.

Predefined entity codes are provided. Use FABU for school loan offices and LDST for loan destinations. The following illustration shows internal and external entities and codes.



EDI Entity Codes for CommonLine 4



EDI Entity Codes for CommonLine 4

Setting Up Financial Aid EDI Destinations

Access the Financial Aid EDI Destination page (Set Up SACR, Product Related, Financial Aid, File Management, Define EDI Business Unit, Financial Aid EDI Destination).

Financial Aid EDI Destination	
Aid Year:	2005
FA EDI Destination:	FABU
FA EDI Destination Information	
*Description:	Financial Aid Bus Unit - PSUNV
Short Description:	FABU
Internet Address:	

Financial Aid EDI Destination page

Enter the Description, Short Description, and Internet Address to set up your FA EDI destinations.

Note. To restrict your outbound files using a setID, enter your setID value as the destination instead of the FABU entity code.

Setting Up EDI Partner Profiles

Access the Profile Definition page (PeopleTools, EDI Manager, Define EDI Transactions, Partner Profiles, Profile Definition).

The screenshot shows the 'Profile Definition' page for an EDI partner profile. The 'EC Profile ID' is 'CL_DESTIN'. The 'Source TPID' field is empty. The 'Description' is 'CommonLine Destination'. The 'EC Outbound File List Path' is 'c:\flatdata\'. The 'EC Outbound File List Name' is 'CL_LIST.TXT'. The 'New List File Per Run' checkbox is checked. A 'Message' button is at the bottom left.

Profile Definition page

Financial Aid uses the EDI partner profile to control the location of created EDI files. A list of all created files can also be generated. CL_DESTIN is a predefined EDI partner profile.

You might want to create an EDI partner profile for each loan destination. For example, you might place files from each bank in a separate directory.

EC Profile ID (electronic commerce profile identification)	Identifies the electronic commerce profile. The EDI Partner Profile component creates profile ID records.
Source TPID	Copy information from an existing EC profile ID. Select the source TPID and click the Copy button.
EC Outbound File List Path	Specify the directory to which you want EDI Manager to write outbound files.
EC Outbound File List Name	Specify the name of the file that lists all outbound files.
New List File Per Run	Select to refresh the file list each time that you run the EC outbound agent.

Message

Click to access the Output Message Header/Footer page and designate a message header and footer.

Setting Up Profile Defaults

Access the Profile Defaults page (PeopleTools, EDI Manager, Define EDI Transactions, Partner Profiles, Profile Defaults).

Profile Definition

Profile Defaults

Available Transactions

Find | View All

First

1 of 5

Last

*EC Transaction ID:

A004P

*In/Out:

0

Profile Defaults

Find | View All

First

1 of 1

Last

*EC Option

Op Value

Action Assignment

Find | View All

First

1 of 1

Last

*EC Action Code:

INS

*Pri Event:

00

Sec Event:

Profile Defaults page

- EC Transaction ID**
(electronic commerce transaction identification)

Select an EDI transaction set ID to create the outbound or inbound file.
- In/Out**

Indicate whether the process is inbound (*I*) or outbound (*O*).
- Pri Event** (primary event)

Indicate the status of the transaction, such as new transaction, cancellation, duplicate, status request, and so on. The system assigns the primary event code. These codes are also called purpose codes.
- Sec Event** (secondary event)

Indicate the type of transaction. Not all transaction types include secondary event codes. These codes are also called transaction codes.

Setting Up EDI Internal Partners

Access the EC Int Partner Def page (PeopleTools, EDI Manager, Set Up Trading Partners, Internal Partners, Ec Int Partner Def).

Ec Int Partner Def

Int TPID:CL4_INT_TP

Descr:CommonLine 4 Internal TP

Business Unit Assignment

Find | View AllFirst1 of 1Last

*PS CodeFATP

*UnitFABU

TP ID Alias Definition

Find | View AllFirst1-2 of 8Last

*Ext TPIDALT_DEST_26

*Alias TPIDFFELP_ALIAS

*Ext TPIDALT_DEST_27

*Alias TPIDFFELP_ALIAS

EC Int Partner Def page

CL4_INT_TP is a predefined internal trading partner for CommonLine processing. You can use this record to complete your EDI Manager setup or you can create your own internal trading partner record.

- Int TPID (internal trading partner identification)

Displays the internal trading partner ID.

PS Code (PeopleSoft code)

Indicates the EDI entity code that identifies the financial aid-related business units at the school, FATP.

Unit

Select the internal financial aid EDI destinations that you set up in the FA EDI Destination page. Use the default value *FABU* or select the unit value that you created for your institution.
- 336

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Ext TPID (external trading partner identification)

Indicate the external trading partner ID with whom this internal partner exchanges data. This field cannot be completed until the EC Ext Partner Def page is set up. The system populates the corresponding section on the EC Ext Partner Def page with the EDI internal partner values.

Note. If you are creating the internal trading partner for the first time, leave this section blank until you have created external trading partners. When you create external trading partners, the system populates this section with external trading partner information.

Alias TPID (alias trading partner identification)

Enter an alias code or the name used for your external trading partner. In the example page, an alias trading partner ID called FFELP_ALIAS has been created.

Setting Up EDI External Partners

Access the EC Ext Partner Def page (PeopleTools, EDI Manager, Set Up Trading Partners, External Partners, Ec ExtPartner Def).

The screenshot displays the 'Ec Ext Partner Def' web form. At the top, the 'Ext TPID' field is populated with 'FFELP_DEST_10'. Below this is the 'Trading Partner Definition' section, which includes a 'Descr' field with 'FFELP Dest 10', a 'Map ID' field with 'COMMONLN_', a 'Profile ID' field with 'CL_DESTIN', and a 'Cvt Pro ID' field with 'COMMONLINE'. The 'Customer / Vendor Assignment' section features a table with columns for '*PS Code' (containing 'LDST'), 'SetID' (empty), and '*PS Customer/Vendor Number' (containing '10'). The 'TP Alias Assignment' section at the bottom has a table with columns for '*Int TPID' (containing 'CL4_INT_TP') and '*Alias TPID' (containing 'FFELP_ALIAS'). Navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible on the right side of the assignment sections.

EC Ext Partner Def page

An external trading partner record must exist for each loan destination that receives CommonLine application send files. To better organize external trading partners, include the loan program and destination number as part of the external trading partner ID.

Trading Partner Definition

Map ID	Select the EDI data map set to use. Use the following value to create CommonLine 4 files: <i>COMMONLN_4</i> : Contains data maps formatted for CommonLine 4.
Profile ID	Select an ID to define EDI outbound file creation parameters for the external trading partner. Profile ID records are created with the EDI Partner Profile page. For CommonLine, the predefined value, <i>CL_DESTIN ID</i> defines where loan files generated by running the EDI outbound file build process should be deposited. Be sure to assign the correct profile ID value if you have created additional partner profiles for external trading partners.
Cvt Pro Ids (conversion data profile IDs)	Select a conversion data profile ID to assign data conversion rules for different EDI transactions. You should always use the delivered CommonLine ID. Select: <i>COMMONLINE</i> : CommonLine data conversion.

Customer/Vendor Assignment

PS Code	Select the EDI entity code that represents your external trading partners. You should use the predefined code <i>LDST</i> .
SetID	Leave this field blank if you are not using a setID to control EDI outbound files. If you use a setID, it must match the financial aid business unit entity code defined in the FA EDI Destination page.
PS Customer/Vendor Number	Select a loan destination. The destination only works if you use LDST for your PS Code value.
Int TPID (internal trading partner identification)	Select the internal trading partner ID that you have set up on the EDI Internal Trading Partner page.
Alias TPID (alias trading partner identification)	This field forms part of a link between external and internal EDI trading partners. <hr/> Note. For CommonLine loan processing, you must use the designated alias trading partner ID at your institution consistently for all CommonLine external trading partners. For example, the example page shown uses an ID of <i>FFELP_ALIAS</i> . This value is used for all CommonLine external trading partners. <hr/>

After you complete the setup of an external trading partner record, the system updates the internal trading partner record with the external trading partner information. You can view this in the TP ID Alias Definition section of the EC Int Partner Def page.

This setup creates the linkage between the internal trading partner (the school), external trading partners (the loan destinations), and the EDI transaction sets (EDI data maps) to run when you create CommonLine application and change files.

Setting Up Loan Transfer IDs

Access the Loan Transfer IDs page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs).

Loan Transfer IDs

Aid Year: 2006 Financial Aid Year 2005-2006
Loan Program: FFELP

View All First 1-2 of 2 Last

*EC Transaction ID	Description	Short Description	Loan Action Type
A004P	CommonLine 4 App Send	CommonLine	
In/Out	Batch Yr	Batch ID	*FA EDI Source Entity Cd
Outbound	6	4P	FATP
			Financial Aid Trading Partner
	*FA EDI Destination Entity Cd:	LDST	Loan Destination

*EC Transaction ID	Description	Short Description	Loan Action Type
C004P	CommonLine 4 Change Send	CommonLine	
In/Out	Batch Yr	Batch ID	*FA EDI Source Entity Cd
Outbound	6	4P	FATP
			Financial Aid Trading Partner
	*FA EDI Destination Entity Cd:	LDST	Loan Destination

Loan Transfer IDs page

The following table lists the outbound EC transaction IDs for CommonLine FFELP and alternative loan programs.

<i>EC Transaction ID</i>	<i>Description</i>	<i>Direction</i>
A004P	CommonLine 4 App Send	Outbound
C004P	CommonLine 4 Change Send	Outbound

EC Transaction ID Select the electronic commerce transaction identification.
(electronic commerce transaction identification)

Loan Action Type This field is not used for CommonLine.

In/Out Indicates whether the file is inbound or outbound.

Batch Yr (batch year) Enter the last digit of the appropriate aid year.

Batch ID Always enter 4P. This is a CommonLine 4 requirement.

FA EDI Source Entity Cd (FA EDI source entity code) Identify the appropriate code for your institution. For most institutions, the source entity code is *FATP*.

FA EDI Source Business Unit The system populates this field after you select an EDI source entity code. The default value should be *FABU*. This field enables EDI Manager to retrieve and generate the appropriate file structure.

FA EDI Destination Entity Cd (FA EDI destination entity code) Identify the appropriate code for the loan destination. For most institutions, the source destination code is *LDST*.

Reviewing Loan Action Codes

This section discusses how to view loan action codes.

Pages Used to Review Loan Action Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Action Code Table	PS_LOAN_ACTNCD_WK00	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table	View loan action codes and messages for a specific aid year and loan program.
Loan Action Codes	LOAN_ACTNCD_TBL	Financial Aid, Loans, View Loan Action Codes, Loan Action Codes	View loan action codes and descriptions.

Viewing Loan Action Codes

Access the Loan Action Code Table page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table).

Loan Action Code Table

Aid Year: 2005 Financial Aid Year 2004-2005

Find First 1 of 4 Last

Loan Program: F FFELP

***Loan Action Type:** D Disbursement

Loan Action Codes

Find | View All First 1-3 of 29 Last

Action Cd	*Description	Short Description	Loan Action Category
A	Adjusted Disbursement	Adjusted	Status
B	Approved Disbursement	Approved	Status
C	Canceled Disbursement	Canceled	Status

Loan Message Codes

Find | View All First 1 of 79 Last

Msg Code:	*Category	*Description	Short Description
001	Reject	Invalid or Missing SSN	SSN

Message Set Number: 14435 **Message Number:**

Loan Action Code Table page

You can modify their descriptions, but do not add or delete loan action codes and messages. The four loan action types are: *Disbursement*, *Origination*, *Promissory Note*, and *Reconciliation*.

Loan Message Codes Loan message codes are received by the school from the sending loan agency and are not generated by PeopleSoft loan processes.

Message Set Number and Message Number These fields are used only by direct lending processes.

Chapter 11

Setting Up Common Record CommonLine (CRC)

This chapter discusses how to:

- Set up loan participants for CRC.
- Set up loan types for CRC.
- Set up loan validation edits for CRC.
- Select equations for the hold and release process for CRC.
- Create loan destinations for CRC.
- Specify loan processes for CRC.
- Set up loan origination for CRC.
- Set up process demographic data for CRC.
- Set up certification requests for CRC.
- Review loan action codes for CRC.

Common Element Used in this Chapter

OPEID (office of
postsecondary education
identifier)

An identifier assigned to a school by the Department of Education.

Setting Up Loan Participants for CRC

To set up loan participants for CRC, use the Create CRC Loan Participants component (SFA_CRC_DEST_ID).

Participants in the loan process include lenders, guarantors, and loan servicers. To streamline the loan process, identify all loan participants and understand their electronic loan processing requirements and agreements with your institution. The loan participants tables are not institution or aid year specific.

This section discusses how to set up guarantors, lenders, and servicers.

Pages Used to Set Up Loan Participants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CRC Loan Servicers	SFA_CRC_DEST_ID	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Participants, CRC Loan Servicers	View, update, or add guarantor, lender, or servicer information that process loan certification request records with your institution.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the CRC Loan Servicers page.	Edit or view guarantor, lender, or servicer address information.
Lender Contact Information	SFA_CRC_DESTCT_SEC	Click the Contact Address link on the CRC Loan Servicers page.	Edit or view the country, mailing address, and email address.

Setting Up Guarantors, Lenders, and Servicers for CRC

Access the CRC Loan Servicers page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Participants, CRC Loan Servicers).

CRC Loan Servicers

OPEID: 889002 **Branch ID:** 0001 **OPEID Type:** Lender
***Description:** PeopleSoft CU - Encino **Short Description:** PS ENC

Participant Information

Country: USA United States **Select Servicer:** Yes
Address: 15821 Ventura Blvd
 Suite 220
 Encino, CA 91436
 Los Angeles [Edit Address](#)
☐ **Preferred Lender** [About Lender](#)
☐ **Certification RQST Participant**

URL Address:

Contact Information

Find | View All First 1 of 1 Last

Contact Number: [Contact Address](#)
Name:
Title:
Functional Area:

CRC Loan Servicers page

Use this page to add your guarantors, lenders, and servicers.

OPEID (office of postsecondary education identifier)	Displays an eight-digit alphanumeric identifier assigned to a federal student aid participant by the Department of Education.
OPEID Type (office of postsecondary education identifier)	Displays the type of lending participant (guarantor, lender, or servicer) for which you are adding information.
Select Servicer	Indicates whether the loan servicer is selected to be an active business partner with the school. Select <i>Yes</i> or <i>No</i> .
Preferred Lender	Select this check box to make this lender available for self-service lender selection by the student.
Certification RQST Participant (certification request participant)	Select if the lender or loan servicer agrees to process loans using certification request.
Edit Address	Click to access the Edit Address page to review or update address information.
Contact Address	Click to review or update contact information.

Setting Up Loan Types for CRC

To set up loan types for CRC, use the Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- Define loan types.
- Link CommonLine loan types to NSLDS loan history information.
- Assign checklists.

Pages Used to Set Up Loan Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Type Table	LOAN_TYPE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table	Define the types of loans your institution uses in the loan origination process.
CommonLine/NSLDS Xref	LOAN_TYPE_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, CommonLine/NSLDS Xref	Link federal loan types defined for CommonLine processing with the borrower's loans reported by the NSLDS.
Checklist Setup	LOAN_TYPE_DOCUMENT	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup	Associate a checklist to be generated when a loan is originated.

Defining Loan Types

Access the Loan Type Table page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table).

Loan Type Table		CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup	
Aid Year:	2007 Financial Aid Year 2006 - 2007		Academic Institution: PSUNV		
Loan Type:	FFEL	Description: FFEL Stafford (Qtr)	Short Description: FFEL_STAF		
Processing		Requirements			
Loan Category:	Sub/Unsub	<input type="checkbox"/> Loan References Required	Nbr Ref Rq:	Loan Fee Rate: %	
Loan Program:	FFELP	<input type="checkbox"/> Credit Check Required		*Max Nbr Disbs: 20	
Loan Refund Indicator:	Borrower	<input type="checkbox"/> Loan Cosigner Required	Nbr Csg Rq:	Min Loan Amt: 1	
		Cosigner Required Amt: \$0			
Loan Item Types Find First 1 of 2 Last					
*SetID: PSUNV	*Item Type: 900000000378	Subsidized Stafford - Quarter			
Loan Fees Customize Find View All First 1-2 of 2 Last					
Loan Fee	Description	Ln Fee Amt	Loan Fee Type	Ln Fee Pct	
GR1	FFEL Guarantee		P	Processing	1.00
OR1	FFEL Origination		P	Processing	2.97

Loan Type Table page

When you set up a loan financial aid item type, you include specific conditions for processing the loan. You must complete the Loan Type Table page to complete the setup. Loan types are used for both CL 4 and CRC.

Processing

Loan Category

Select from *Alt Loan* (alternative loan), *PLUS*, *Sub/Unsub* (subsidized/unsubsidized), *Subsidized*, and *Unsubsidized*. If you select *PLUS*, a Graduate PLUS Indicator check box displays. Select the check box for Grad PLUS loans.

Loan Program

Select from *Alternative*, *Direct*, *FFELP*, *Health*, *Perkins*, *State*, and *University*.

For example, to set up Stafford loans processed through CommonLine, the loan category is Sub/Unsub and the loan program is FFELP. To set up an alternative loan program processed through CommonLine, the loan category is Alt Loan (alternative loan), and the loan program is Alternative.

Loan Refund Indicator

Select from:

Borrower: Select to have the borrower of the loan receive any refunds or overage. For example, the borrower could be a parent or guardian for a PLUS loan.

Student: Select to have the student to receive any refunds from the loan.

You can override this field at the loan application level. Designating the student as the recipient for PLUS refunds requires additional setup in PeopleSoft Enterprise Student Financials.

Requirements

The system enforces the selected requirements during loan origination and validation.

Loan References Required	Enter reference information on the CommonLine Promissory Note PLUS/Alt and Originate Loans components. Enter the number of references required in the Nbr Ref Rq (number of references required) field.
Nbr Ref Rq (number of references required)	Enter the number of references required if you selected the Loan References Required check box.
Credit Check Required	Select to require a credit check.
Loan Cosigner Required	If you select this check box, enter the number of cosigners required in the Nbr Csg Rq (number cosigners required) field.
Nbr Csg Rq (number cosigners required)	Enter the number of cosigners required if you selected the Cosigner Required Amount check box.
Cosigner Required Amount	Enter the minimum loan amount requiring a cosigner. Enter cosigner information on the CommonLine Promissory Note PLUS/Alt and Originate Loans components. This setting is enforced by the loan servicer.
Loan Fee Rate	Enter the loan fee rate to print on the promissory note for this loan type. Ensure that the loan fee rate matches the loan fee setup for the item type that you associate with this loan type.
Max Nbr Disbs (maximum number disbursements)	Indicates the maximum amount of disbursements.
Min Loan Amt (minimum loan amount)	Indicates the smallest amount for which a loan can be originated.

Loan Item Types

Select a setID and an item type. You can have multiple item types associated with the same loan type. You cannot share item types across multiple loan types. For example, to define FFELP Stafford loans where the loan category is Sub/Unsub, enter the subsidized and unsubsidized item types.

Note. Based on the business processes defined by your institution, you may need to create multiple loan types for the same loan program.

The system displays the type loan fee, loan fee amount, fee type, and loan fee percent for the item type selected. These values are associated with the item type when you set up the financial aid item type on the Loan Fee Table page.

See Also

Chapter 5, "Setting Up Packaging Basics," Attaching Loan Fees, page 129

Linking CommonLine Loan Types to NSLDS Loan History Information

Access the CommonLine/NSLDS Xref page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, CommonLine/NSLDS Xref).

Loan Type Table		CommonLine/NSLDS Xref		Direct Loan Options		Checklist Setup	
Aid Year: 2007 Financial Aid Year 2006 - 2007				Academic Institution: PSUNV			
Loan Type FFEL FFEL Stafford (Qtr)							
Loan Program: FFELP				Loan Category: Sub/Unsub			
Valid CommonLine Codes							
Alternative Loan Type Cd: <input type="text"/>							
Valid NSLDS Codes Find View All First Last							
NSLDS Loan Type: <input type="text" value="SF"/> Stafford							

CommonLine/NSLDS Xref page

When you originate a CommonLine loan, the system uses the information set up on this page to search for similar loans in the borrower's NSLDS history. If a prior loan is found, the system uses the prior loan information to derive the new loan's destination. This optional feature can be set up in the Loan Institution setup page.

Alternative Loan Type Cd (alternative loan type code) Indicates a code to notify loan agencies the type of alternative loan. Alternative loan codes are assigned by NCHELP.

NSLDS Loan Type Select a loan type to translate the NSLDS loan type that's defined in the NSLDS tables.

See Also

<http://committees.nchelp.org/esc/default.aspx>

Assigning Checklists

Access the Checklist Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup).

Loan Type Table	CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup
Aid Year:	2005 Financial Aid Year 2004-2005	Academic Institution:	PSUNV
Loan Type:	FFEL FFEL Stafford (Qtr)	Checklist:	FFELP FFELP P Nt
Loan Program:	FFELP	Loan Category:	Sub/Unsub

Checklist Setup page

The values of the Loan Type, Loan Program, and Loan Ctgr (loan category) fields are based on the aid year and academic institution that you selected to access the page.

Checklist

Select a checklist to be created when a loan is originated.

Note. For Direct Loan, the system does not generate an assigned checklist during loan origination. It generates an assigned checklist when you run the print promissory note process.

Setting Up Loan Validation Edits for CRC

To set up loan validation edits for CRC, use the Maintain CRC Loan Edits component (SFA_CRC_EDITS) and Create Loan Edit Sets component (SFA_CRC_EDITDFT).

This section provides an overview on loan validation edits and discusses how to:

- Define validation edit messages.
- Create loan validation edit sets.

See Also

Equation Engine Programmer's Guide, PDF distributed with the PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook

Understanding Loan Validation Edits

Loan edits verify that the loan origination data is valid for transmission to the receiving loan agency. All CommonLine loan validation edits must be defined in the Loan Edits/Message Table page. Financial Aid delivers a core set of edits to be used during loan validation. All CommonLine loan edits are equations written using the Equation Engine. Separate edits are created for both CRC and CL 4 loans. You can use the Equation Engine to create or modify equations to support loan agencies that are not defined as a CommonLine standard.

Pages Used to Set Up Loan Validation Edits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Edits/Messages	SFA_CRC_EDITS	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Maintain CRC Loan Edits, Load Edits/Messages	View delivered edits and error messages used in loan validation. You must correct all loan errors before loan data can be selected for outbound processing. You can modify the message text.
Loan Edit Defaults	SFA_CRC_EDITDFT	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Edit Sets, Loan Edit Defaults	Create loan validation edit sets that are used when constructing loan destination profile records. Loan edit default sets are logical sets of edits that can be executed based on loan program, loan category and process level. After they are added to a loan destination, you can further modify the edit sets to function according to the loan destination's business rules.

Defining Validation Edit Messages

Access the Loan Edits/Messages page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Maintain CRC Loan Edits, Load Edits/Messages).

Loan Edits/Messages			
		Find View All	First 1-4 of 25 Last
*Equation:	FACRADDR01	Permanent address missing	ADDR01
Edit Error Msg:	Permanent address missing.		
*Equation:	FACRADDR02	Mailing address missing	ADDR02
Edit Error Msg:	Mailing address missing.		
*Equation:	FACRADDR03	Borrower perm address missing	ADDR03
Edit Error Msg:	Borrower perm address missing.		
*Equation:	FACRADDR04	Borrower mailing addr missing	ADDR04
Edit Error Msg:	Borrower mailing address missing.		

Loan Edits/Messages page

This page is delivered preloaded. Review and update edit error messages as needed. New loan edits created with the Equation Engine must be added to this page for the loan validation process to use them. Use the Equation field to select an Equation Engine equation.

The Loan Orig Edit Errors (loan origination edit errors) page in the Maintain Originated Loans component (SFA_CRC_ORIG) displays any edit errors encountered during the loan origination process.

Predefined errors are described in this table:

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRADDR01	Permanent address missing.	Used for alternative/PLUS loans. A valid permanent address cannot be found for the student. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FACRADDR02	Mailing address missing.	Used for alternative/PLUS loans. A valid mailing address cannot be found for the student. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRADDR03	Borrower perm address missing.	A valid permanent address cannot be found for the borrower. The address type is based on the FA Process Demographic Use page permanent address usage setting.	Add a valid address to the borrow ID that can be used as the permanent address on the Addresses page or modify the permanent address usage setting to select one of the student's existing addresses.
FACRADDR04	Borrower mail address missing.	A valid mailing address cannot be found. The address type is based on the FA Process Demographic Use page mail address usage setting.	Add a valid address that can be used as the mailing address on the Addresses page or modify the mailing address usage setting to select one of the student's existing addresses.
FACRBORROW01	Loan borrower not defined.	Used for PLUS loans. The Borrower ID field in the Maintain Originated Loans component is blank.	Enter the correct ID on the Loan Origination 1 page. Parent borrowers must already be defined in PeopleSoft Enterprise Campus Community Fundamentals.
FACRCHNG01	Loan increase with undisbursed check.	Used for change transactions. A post disbursement change transaction is generated and an undisbursed check exists for the loan.	Disburse the funds to the student account or return the funds to the lender.
FACRCOSIGN01	No cosigners - cosigners required.	Used for alternative loans. If cosigners are required for the loan type, the edit verifies that the required number of cosigners are not defined in the Relationships page for the student and are also assigned to the loan.	Add the missing cosigners in the Relationships page and Maintain Originated Loans component.
FACRCOSIGN02	Cosigner signature required.	Used primarily for alternative loans. Cosigner signatures have not been entered in the Enter Alt Loan Prom Notes page.	Fix the data on the Alt Loan Prom Notes page.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRDEBT01	Total student loan debt required.	Used for alternative loans. The total loan debt on the Maintain Originated Loans component is 0, and NSLDS loan history exists.	Update the total loan debt in the Maintain Originated Loan component using the Loan Demographic Data page.
FACRDEPSTAT1	Dependency Status missing.	The student's federal dependency status was missing when the loan was originated.	Use the Loan Demographic Data page to update the dependency status in the Maintain Originated Loan component.
FACRDEST01	Loan destination is zero missing.	The loan destination is not assigned after the loan has been originated. This edit is always executed by the loan validation process and cannot be deactivated.	Assign a loan destination in the Loan Origination 1 page.
FACRDISBDT01	Disbursement more than 90 days after loan period end.	A disbursement date is set for greater than 90 days beyond the loan period end date.	Change the date on the Loan Origination 2 page.
FACRDISBDT02	Disbursement date earlier than 13 days of loan period start.	The first disbursement precedes the loan period begin date by more than 13 days.	Fix the disbursement date or loan period start date in the Loan Origination 2 page.
FACRDISBDT03	Disbursement dates must be in chronological order.	Disbursement dates are not in order.	Fix disbursement dates in the Maintain Originated Loan component, Loan Origination 2 page.
FACRDRVLIC01	Borr DL Number or state missing.	The borrower's drivers license information was incomplete when the loan was originated.	Update the driver's license data in the Driver's License page and then use the Loan Demographic Data page to update this information in the Originate Loan component.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRGRADDT01	Grad date before loan end date.	The graduation date viewed in the Maintain Originated Loans component is before the end of the loan period.	Update the FA Term graduation date (if required) and then use the Loan Demographic Data page to update this graduation date in the Maintain Originated Loans component.
FACRHOLDFED1	Disbursement hold on federal aid.	A disbursement hold on federal aid has been placed on the student.	Remove the federal aid disbursement hold on the student in the Packaging Status Summary page.
FACRNAME01	Student Name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the student's name on the Names page or modify the name usage setting to select one of the student's existing names.
FACRNAME02	Borrower name missing.	A valid name type cannot be found. The name type should be based on the FA Process Demographic Use page name usage setting.	Add a valid name type that can be used as the borrower's name on the Names page or modify the name usage setting to select one of the borrower's existing names.
FACRPER01	Loan period greater than 1 year.	The loan period defined in the Loan Origination 2 page is more than one year.	Change the loan period dates so that the loan period is less than a year.
FACRPLUS01	PLUS borrower and student SSN are the same.	A PLUS borrower cannot be the student.	Correct possible invalid relationship defined for the student. Assign a new borrower for the PLUS loan.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRPLUS02	No PLUS for grad students allowed.	The student has a graduate NSLDS level in the FA Term record when the loan is originated.	Cancel the loan if appropriate, or change the student's grade level to an undergraduate in the correct FA Term record. If you change the student's grade level, then you also need to use the Loan Demographic Data page to update it in the Originate Loan component.
FACRPLUSMPN	Serial PLUS MPN check.	For PLUS loans. Confirms a prior PLUS loan with the same EmplID, borrower EmplID, and lender in the CommonLine MPN Usage page with the current PLUS loan.	To process serially, modify the loan record by changing the borrower or loan destination so that the borrower and lender match the information in the CommonLine MPN Use page. If the loan should be processed as a new MPN, set the Serial Loan Code field on the Loan Origination 3 page from S to N.
FACRREFS01	References missing.	The required number of references have not been defined for the student in the Relationships page and have not been assigned to the loan.	Add the missing references in the Relationships page and Maintain Originated Loans component.
FACRSRVCIN01	Service indicator exists.	An active negative service indicator is assigned to the student.	Remove the service indicator.
FACRSSN01	Borrower SSN is blank.	For PLUS and Alternative loans. When the loan was originated, either the borrower was not assigned, or the borrower ID did not have a valid Social Security Number (SSN). A valid SSN has the appropriate country code and a NID type of PR.	Verify that the borrower is assigned in the Maintain Originated Loans component. If appropriate, fix the SSN on the Biographical Details page component and then pull the SSN into the originated loan record using the Loan Demographic Data page.

<i>Equation</i>	<i>Description</i>	<i>Cause</i>	<i>Resolution</i>
FACRSSN02	Student SSN is blank.	When the loan was originated, the student did not have a valid SSN. A valid SSN has the appropriate country code and a NID type of PR.	Fix the SSN on the Biographical Details page and then pull the SSN into the originated loan record using the Loan Demographic Data page.

Creating Loan Validation Edit Sets

Access the Loan Edits Defaults page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Edit Sets, Loan Edit Defaults).

Loan Edit Defaults

Academic Institution: PSUNV **Loan Program:** FFELP
Loan Category: Sub/Unsub **Processing Level:** Guarantee Only

Default Profile Edits
Find | View All First 1-4 of 4 Last

*Equation:	FACRADDR01	Permanent address missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	

*Equation:	FACRDEPSTAT1	Dependency stat missing	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	

*Equation:	FACRDEST01	Loan Dest Nbr is Zero	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	

*Equation:	FACRSSN01	Borrower SSN is blank	+ -
Loan Requirement Status:	Required	<input checked="" type="checkbox"/> Loan Edit Activated	

Loan Edits Defaults page

Create logical sets of loan validation edits based on the loan program, loan category, and processing level. When creating loan destination profiles, the system uses these edit sets to automatically populate the loan destination edits page for the loan destination, simplifying your setup.

Loan Program Values are: *Alternative*, *FFELP*, *Direct Lending*, *Health Professions*, *State*, and *University*.

Loan Category Values are: *Alt Loan* (alternative loan), *PLUS*, *Sub/Unsub* (subsidized/unsubsidized), *Subsidized*, and *Unsubsidized*.

Processing Level Values are: *Direct* (not applicable), *Guarantee and Print Appl* (guarantee and print application), *Print and Guarantee*, *Guarantee Only*, *School Cert Request* (school certification request), and *Manual*.

Default Profile Edits

Define loan edits to use during validation for the selected loan program, category, and destination processing level. In addition to creating new edit sets, you can also add or delete edits, or activate or deactivate existing edits.

Equation	Select a predefined equation. Edit equations are set up on the CRC Loan Edits/Messages page.
Loan Requirement Status	<p>For each section, indicate one of the following:</p> <p><i>Optional:</i> The selected section is not a requirement for the loan.</p> <p><i>Recommended:</i> The selected section is not a requirement for the loan.</p> <p><i>Required:</i> The selected section is a requirement for the loan.</p> <hr/> <p>Note. The field value does not drive current loan functionality, but is intended to support future business processes.</p> <hr/>
Loan Edit Activated	Select to activate an edit.

Selecting Equations for the Hold and Release Process for CRC

To set up equations for the hold and release process for CommonLine loans, use the Hold and Release Equations component (LN_CLHR_EQ_NAME).

This section discusses how to select equations for the CommonLine disbursement hold and release process. This process is used for both CommonLine 4 and Common Record CommonLine loans.

Page Used to Set Equations for Hold and Release

Page Name	Definition Name	Navigation	Usage
Hold/Release Equations	LN_HR_EQ_NAME_PNL	Set Up SACR, Product Related, Financial Aid, Loans, Hold and Release Equations, Hold/Release Equations	Select the equations that you require the hold and release process to execute.

Selecting Equations for Hold and Release

Access the Hold/Release Equations page (Set Up SACR, Product Related, Financial Aid, Loans, Hold and Release Equations, Hold/Release Equations).

Hold/Release Equations

Institution: PSUNV PeopleSoft University

Process Name: HOLD_REL

Description:

Equation Name		Find View All	First	1-2 of 2	Last
*Equation Name	Description				
<input type="text" value="FAHDLOADLVL"/>	Load Level Status Check				<div>+ -</div>
<input type="text" value="FAHDSAPSTAT"/>	Satisfactory Academic Progress				<div>+ -</div>

Hold/Release Equations page

The equations that you select on this page form an equation set unique to the specified process name.

Description	Displays the process for which you are selecting equations.
Equation Name	Select an equation. The list contains all equations created for the selected institution; select only those equations created specifically for hold and release processing.

If you use the hold and release process at your institution without modifications, create at least one hold/release equation set with the two provided hold and release equations: FAHDLOADLVL (Load Level edit) and FAHDSAPSTAT (Satisfactory Academic Progress check).

Note. If you create your own equations, follow the naming conventions described in the Equation Engine documentation to prevent the accidental deletion of custom equations during application upgrades.

Creating Loan Destinations for CRC

To set up loan destinations for CRC, use the Create CRC Loan Destinations component (SFA_CRC_DEST_PROF).

This section provides an overview on loan destinations for CRC and discusses how to:

- Define loan destination profiles for CRC.
- Define loan processing levels for CRC.

- Define loan destination validation edits for CRC.

Understanding Creating Loan Destinations for CRC

Consolidate the loan participants—the lender, guarantor, and servicer—into one entity, the loan destination. The loan destination defines the business characteristics and protocols between a lender, guarantor, and servicer which enables them to process loans for the school. You must create a loan destination profile for each lender/guarantor/servicer relationship in the FFELP loan program and alternative loan program, and for the Direct Lending servicer for direct loans.

Note. If you continue to process loans under the CommonLine 4 protocol, you should not create active CRC loan destination profiles for the same CommonLine 4 destinations until you are ready to use them.

Page Used to Create Loan Destinations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Dest Profile	SFA_CRC_DEST_PROF	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Loan Dest Profile	Define participants that your institution uses to exchange loan application data.
Process Levels	SFA_CRC_DEST_PROF2	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Process Levels	Define the valid loan processing levels for the loan destination.
Validation Edits	SFA_CRC_DEST_EDITS	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Validation Edits	Define the validation edits to be used for loans originated for the loan destination.

Defining Loan Destination Profiles for CRC

Access the Loan Dest Profile page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Loan Dest Profile).

Loan Dest Profile		Process Levels		Validation Edits	
<div>Loan Destination Profile</div> <div>Find View All First 1 of 1 Last</div>					
Academic Institution:	PSUNV	Loan Destination Nbr:	1	Loan Program:	FFELP
*Effective Date:	01/01/1900	Status:	Active		
Description:	PNC Bank/CSAC	Short Description:	PNC/CSAC		
Destination Components					
*Guarantor OPEID:	706	California Student Aid Commiss			
Lender OPEID:	809921	PNC Bank	Lender Branch ID:	0000	
Servicer OPEID:		Servicer Branch Code:			
File Routing Control					
Application:	Guarantor	<input checked="" type="checkbox"/> Accept Change Records			
Pre Disb Changes:	Lender				
Post Disb Changes:	Lender				
File Path	\\ntserv01\CRC files\Dest1\				
Build Options					
CRC Version:	CRC	Prom Note Delivery Default:	Paper		
Stafford MPN Default	Serial MPN	Disb Hold/Release Default:	Release		
PLUS MPN Default	Serial MPN	Funds Return Method Code:	EFT		

Loan Dest Profile page

Loan Destination Profile

Loan Destination Nbr Indicates the loan destination number.
(loan destination number)

Effective Date Enter the date for which this destination is valid and active.

Status Indicates the effective status. Select *Active* or *Inactive* for the effective-dated row set.

Destination Components

Guarantor OPEID, Lender OPEID, Servicer OPEID (office of postsecondary education identifier) Indicates the numeric identifier assigned by the Department of Education.

Lender Branch ID Indicates the lender branch ID. This field is required if a Lender OPEID value exists.

Servicer Branch Code Indicates the servicer branch code. This field is required if a Servicer OPEID value exists.

File Routing Control

Application	Indicates the recipient of the CRC application file. The system displays the recipient name and OPEID used on the XML document record.
Pre Disb Changes (pre disbursement changes)	Indicates the recipient of the CRC change file. The system displays the recipient name and OPEID used on the XML document record.
Post Disb Changes (post disbursement changes)	Indicates the recipient of the CRC change file. The system displays the recipient name and OPEID used on the XML document record.
File Path	Indicates the physical location in your production environment where the CRC XML files are to be created. <hr/> Note. The correct syntax of the path statement is dependent on the schools operating systems. The path must end in a closing character (a back slash or forward slash). <hr/>
Accept Change Records	Select this check box to indicate that the loan destination accepts change records. The Pre Disb Changes and Post Disb Changes fields are not be accessible if the loan destination does not accept changes.

Build Options

CRC Version	Select <i>CRC</i> to indicate the CommonLine protocol the loan destination supports.
Stafford MPN Process Default	Select <i>New MPN</i> or <i>Serial MPN</i> to indicate the default serial MPN indicator to assign during origination.
PLUS MPN Process Default	Select <i>New MPN</i> or <i>Serial MPN</i> to indicate the default serial MPN indicator to assign during origination.
Prom Note Delivery Default (promissory note delivery default)	Select <i>Email</i> , <i>Paper</i> , or <i>Web</i> to establish the default method for delivering promissory notes to the lender.
Disb Hold/Release Default (disbursement hold/release default)	Select <i>Hold</i> , <i>No Support</i> , or <i>Release</i> to establish the disbursement hold/release status to assign during origination.
Funds Return Method Code	Select <i>Borr Check</i> , <i>EFT</i> , <i>Master Chk</i> , or <i>Netting</i> to establish the method for which funds are returned by the school to the lender or disbursing agent.

Defining Loan Processing Levels for CRC

Access the Process Levels page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Process Levels).

Loan Dest Profile		Process Levels		Validation Edits	
CRC Options Find View All First 1 of 1 Last					
Academic Institution: PSUNV		Loan Program: FFELP			
Loan Destination Nbr: 1		Description: PNC Bank/CSAC			
Effective Date: 01/01/1900		Effective Status: Active			
Valid Category/Process Level Find View All First 1-4 of 4 Last					
*Loan Category: Sub/Unsub		Effective Date: 01/01/1900			
<input type="checkbox"/> Originated with Prom Note		Processing Level: Guar/Print			
*Loan Category: Sub/Unsub		Effective Date: 01/01/1900			
<input checked="" type="checkbox"/> Originated with Prom Note		Processing Level: Guar Only			
*Loan Category: PLUS		Effective Date: 01/01/1900			
<input type="checkbox"/> Originated with Prom Note		Processing Level: Guar/Print			
*Loan Category: PLUS		Effective Date: 01/01/1900			
<input checked="" type="checkbox"/> Originated with Prom Note		Processing Level: Guar Only			

Process Levels page

Define the valid process levels the loan destination supports. The loan origination process uses these setting to determine the correct process level to assign during the loan origination process.

Loan Category

Select from: *Alt Loan* (alternative loan), *PLUS*, *Sub/Unsub* (subsidized/unsubsidized), *Subsidized*, and *Unsubsidized*.

The values to use are dependent on the loan categories used to define the loan types at the school.

Originated with Prom Note

Select the check box to indicate that the corresponding process level be used during origination. The loan origination process determines the process level based on whether a promissory note exists at the school for a student.

Processing Level

Select the loan processing level that the loan destination performs for the corresponding loan category. Select from: *Cert Req* (certification request), *Direct* (Direct Lending. This is not a valid selection), *Guar Only* (guarantee only), *Guar/Print* (guarantee and print), *Manual* (loan is not transmitted electronically), and *Print/Guar* (print and guarantee).

Defining Loan Destination Validation Edits for CRC

Access the Validation Edits page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Create CRC Loan Destinations, Validation Edits).

Loan Dest Profile	Process Levels	Validation Edits
Validation Edits Find View All First 1 of 1 Last		
Academic Institution: PSUNV Loan Destination Nbr: 1 Effective Date: 01/01/1900		Loan Program: FFELP Description: PNC Bank/CSAC Status: Active
Edit Sets Find First 1 of 4 Last		
Loan Category: Sub / Unsub Processing Level: Guarantee and Print Appl		Originated with Prom Note: No
Edits Find View All First 1-3 of 7 Last		
*Equation: FACRADDR01 Requirement Status: Required		Permanent address missing <input checked="" type="checkbox"/> Activate
*Equation: FACRCHNG01 Requirement Status: Required		Loan incr w/undisbursed check <input checked="" type="checkbox"/> Activate
*Equation: FACRDEPSTAT1 Requirement Status: Required		Dependency stat missing <input checked="" type="checkbox"/> Activate

Validation Edits page

This page defines the loan validation edits for the loan destination. The edits are pre-populated from the Loan Edits Defaults page when process level rows are created on the Process Levels page. Insert additional edits or remove invalid edits that are specific to the loan destination.

Equation Select a predefined edit statement.

Activate Select to activate an edit.

Specifying Loan Processes for CRC

To set up loan processes for CRC, use the Define Loan Institutions component (LOAN_INST_TABLE).

This section discusses how to define loan processes for CRC.

Pages Used to Set Up Loan Processes

Page Name	Definition Name	Navigation	Usage
Loan Institution Table	LOAN_INST_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table	Define how your school processes loans for the academic year. You can define loan processes for each academic career of your institution.

Page Name	Definition Name	Navigation	Usage
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the Institution Address link on the Loan Institution Table page.	Enter address information for each loan institution.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Update the address, mailbox type, and mailbox identification.

Defining Loan Processes for CRC

Access the Loan Institution Table page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table).

Loan Institution Table		Loan Destination Default	
Academic Institution:	PSUNV	PeopleSoft University	
Aid Year:	2005	Financial Aid Year 2004-2005	
School Code	Branch	Description	Short Description Career
001315	00	PEOPLESOFT UNIVERSITY	PEOPLESOFT Undergrad
Loan Processing Info			
FFELP/Direct Participant:	All Loans	DUNS ID:	123456789
DL Disclosure Print:	LOC	DL SchCd:	G01315
SSN Source:	CC		
<input type="checkbox"/> COD Full Participant		<input checked="" type="checkbox"/> DL Serial MPN Activation	<input type="checkbox"/> EDE Special School
Institution Address			
Contact Information Find View All First 1 of 1 Last			
Contact Nbr:	1		
Name:	SMYTHE,BRENDA		
Title:	COORDINATOR	Func Area:	LOAN
Loan Institution Contact			

Loan Institution Table page

Set up your institution for loan processing by specifying the valid loan processes and contact information

FFELP/Direct Participant Select if the loan institution can originate FFELP or direct loans, or both. Values are: *All Loans*, *Direct*, and *FFELP*.

DL Disclosure Print For direct lending.
(direct lending disclosure print)

DL SchCd (direct lending school code) If your institution processes direct loans, enter your direct lending school code. This field is hidden if your school does not participate in the direct lending program.

SSN Source (social security number source)	For direct loans. Select the source of the student's Social Security Number, such as from Campus Community.
COD Full Participant	Select if your institution is a full COD participant.
DL Serial MPN Activation (direct loan serial master promissory note activation)	Select if the loan institution that you are defining uses the direct loan serial master promissory note. This field is hidden if your school does not participate in the direct lending program.
EDE Special School (electronic data express special school)	For direct loans. Select to set an identification trigger on the origination file. This is for schools approved by the Department of Education for special consideration for direct loan processing by the Loan Origination Center (LOC). Usually the default rate for the school must be lower than 10%.
Contact Nbr (contact number)	Enter contact information for each financial aid administrator in charge of loan processing. Assign a contact number for each entry.
Institution Address	Click to access the Loan Institution Address Information page.
Loan Institution Contact	Click to access the Loan Institution Contact Information page and update the address, mailbox type, and mailbox identification.

Setting Up Loan Origination for CRC

To set up loan origination for CRC, use the Reassign Loan Agencies component (LN_AGENCY_DFLT) and Define Loan Institutions component (LOAN_INST_TABLE).

This section provides an overview of loan origination and discusses how to:

- Specify a default loan agency for CRC.
- Set up loan destination defaults for CRC.

Understanding Loan Origination for CRC

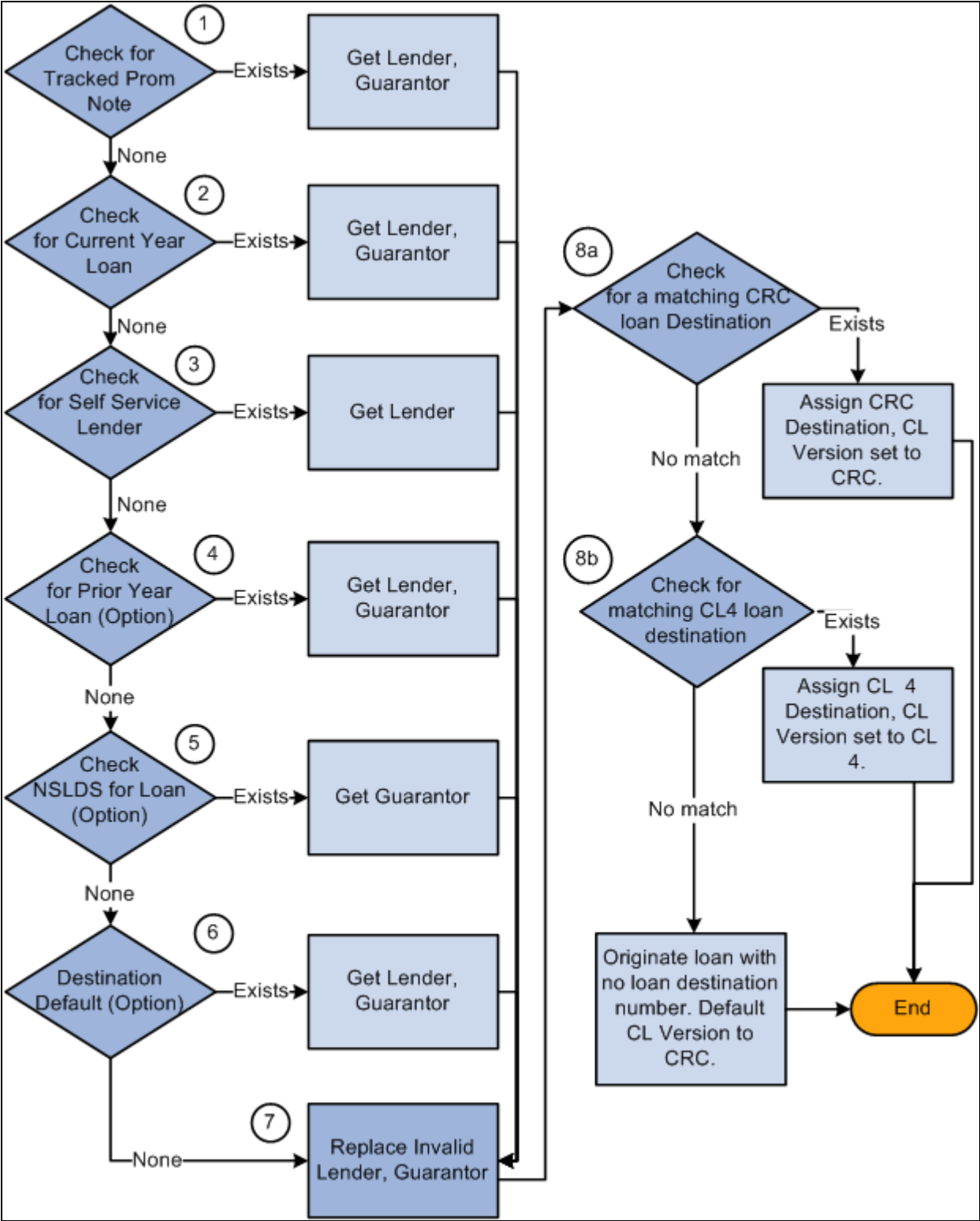
Because CommonLine 4 process levels only require a guarantor to originate a loan, the loan destination that you use to originate the loan might not be the same loan destination that you use to guarantee the loan.

Loan origination follows a seven-step process to determine the lender and guarantor and then determine the loan destination. You determine which steps to follow when you set destination defaults.

Step	What Happens	Possible Information Selected
Step 1 – This step is always performed.	If an active unused promissory note is tracked, the designated lender and guarantor are selected from the form used for origination. Steps 2 through 6 are skipped.	Lender Only Guarantor Only Lender and Guarantor No Information
Step 2 – This step is always performed.	If a matching loan is originated and guaranteed in the current aid year for the borrower, the lender and guarantor are used from the earlier origination record. Steps 3 through 6 are skipped.	Lender and Guarantor No Information
Step 3 – Optional	If the student has selected a lender on a self-service page, the process uses the selected lender and skips steps 4 through 6.	Lender No information
Step 4 – Optional	The origination process looks back one year for a prior year originated loan of the same loan type. If a prior loan is found, steps 5 and 6 are skipped.	Lender and Guarantor No Information
Step 5 – Optional	The origination process looks at the current NSLDS history to find a previously originated loan of the same loan type. A new NSLDS loan type cross reference section is available in the Loan Type Table component to facilitate this step. If a prior loan is found, step 6 is skipped. Note. Only the guarantor is used from the NSLDS loan history.	Guarantor Only No Information
Step 6 – Optional	A default destination is assigned. User can assign a default CL 4 or CRC destination number.	Lender Only Guarantor Only Lender and Guarantor No Information

Step	<i>What Happens</i>	<i>Possible Information Selected</i>
Step 7 – This step is always performed.	Checks the validity of the selected lender and guarantor values and reassigns lender and guarantor IDs as defined in the Agency Default page.	Lender Only Guarantor Only Lender and Guarantor No Information
Step 8	Based on the lender, guarantor, and servicer information selected in the prior six steps, the loan origination process searches for a matching CRC loan destination profile record. If one is not found, the CL 4 loan destination profile records are checked for a matching record. If one is not found, the loan is still originated, but it cannot be transmitted until a loan destination is assigned.	Loan Destination No Destination

The following chart illustrates the process:



Process flow to determine loan destination

Pages Used to Set Up Loan Origination for CRC

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Agency Default Setup	LN_AGENCY_DFLT	Set Up SACR, Product Related, Financial Aid, Loans, Reassign Loan Agencies, Agency Default Setup	<p>Identify a default agency if the borrower does not select a lender, guarantor, or servicer. Identify lenders, guarantors, or servicers that are no longer in service and have them replaced automatically with a new agency when a loan is originated.</p> <p>Note. Schools that have defined loan agency default records for CL 4 loan processing for the aid years that are still active must update the records using the new CRC fields. The CL 4 setting is ignored by the loan origination process.</p>
Loan Destination Default	LOAN_INST_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default	Set up loan destination default parameters.

Specifying a Default Loan Agency for CRC

Access the Agency Default Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Reassign Loan Agencies, Agency Default Setup).

Agency Default Setup

Aid Year: 2005 Financial Aid Year 2004-2005 **Academic Institution:** PSUNV

Loan Program: FFELP

Loan Agency Default Parameters			
Find View All First ◀ 1 of 1 ▶ Last			
*Agency Type:	<input type="text" value="Lender"/>	Nbr:	<input type="text" value="1"/>
OPEID:	<input type="text"/>	Branch ID:	<input type="text"/>
New OPEID:	<input type="text" value="800720"/>	New Branch ID:	<input type="text" value="0000"/> Bank of America
Comments:	<input type="text" value="Default lender if none is selected."/>		
CL4 Agency ID:			
CL4 New Agency:			

Agency Default Setup page

Agency Type	Select from <i>Guar/Ins</i> (guarantor/insurer), <i>Lender</i> , or <i>Servicer</i> .
OPEID (office of postsecondary education identifier)	Select the identifier of the loan agency that to be reassigned or leave blank if you are setting a default agency.
Branch ID	Select the branch identification of the OPEID.
New OPEID (office of postsecondary education identifier)	Select the identifier assigned to your school by the Department of Education.
New Branch ID	Select the branch identification of the new OPEID.

Note. Customers who have upgraded from a previous release of Campus Solutions see their original CL 4 loan agency default settings.

CL4 Agency ID	Indicates the lender or guarantor ID of previously stored agency default data. The system displays the name and OPEID of the agency if not blank. This field appears only if you have recently upgraded from Release 8.0 SP1.
CL4 New Agency	Indicates the lender or guarantor ID of previously stored agency default data. The system displays the name and OPEID of the agency if not blank. This field appears only if you have recently upgraded from Release 8.0 SP1.

Setting Up Loan Destination Defaults for CRC

Access the Loan Destination Default page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default).

Loan Institution Table		Loan Destination Default		
Academic Institution:	PSUNV	PeopleSoft University		
Aid Year:	2007	Financial Aid Year 2006 - 2007		
School Code	Branch	Description	Short Description	Career
001315	00	PEOPLESOFT UNIVERSITY	PEOPLESOFT	Graduate
Default Loan Destination Parameters				
Find View All First 1 of 3 Last				
*Loan Program:	FFELP			
1. Current Prom Note 2. Current Year Originations 3. Student Selected Lender 4. <input type="checkbox"/> Check Prior Year's Destination 5. <input type="checkbox"/> Check NSLDS for Guarantor 6. Default Destination <input type="checkbox"/> Use CRC Destination				

Loan Destination Default page

The order the loan origination process uses to choose the loan destination for the student is as follows: Current Promissory Note, Current Year Originations, Check Prior Year Originations, Check NSLDS for Guarantor, and then Default Destination.

Loan Program Select from: *Alternative, Direct, FFELP, Health, Perkins, State, and University.*

Current Prom Note (current promissory note), The loan origination process always performs these steps.

Current Year Originations, and Student Selected Lender

Check Prior Year Originations and Check NSLDS for Guarantor Select to have the system perform these steps.

Default Destination If nothing results from the first four search methods, the system uses this default destination.

Use CRC Destination Select to control the searching of the default loan destination profile. If not selected, the system only searches CL 4 destinations. If selected, the system only searches CRC loan destinations.

Note. Choosing a CL 4 or CRC loan destination does not guarantee that the originated loan uses the same CommonLine version—the system continues to perform the loan origination logic.

Setting Up Process Demographic Data for CRC

To set up process demographic data for CRC, use the Define Demographic Data Use component (FA_PRCSDemo_TBL). The loan origination process extracts borrowers' demographic information from Campus Community.

This section discusses how to set up process demographic data for CRC.

Pages Used to Set Up Demographic Data for CRC

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Process Demographic Use	FA_PRCSDemo_TBL	Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use	Indicates how to retrieve the student demographic information for loan processing. The loan origination process extracts borrowers' demographic information from Campus Community.
Address Usage	ADDR_USAGE_TABLE	<ul style="list-style-type: none"> Click the Address Usage Table link on the FA Process Demographic Use page. Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table 	Define hierarchies of address types to search for and use in a specific usage. The FA Process Demographic Use page selects the appropriate constructs defined in this page to determine the addresses to use in loan processing.
Name Usage	NAME_USAGE_TABLE	<ul style="list-style-type: none"> Click the Name Usage Table link on the FA Process Demographic Use page. Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table 	Define hierarchies of name types to search for and use in a specific usage. The FA Process Demographic Use page selects the appropriate constructs defined in this page to determine the names to use in loan processing.

Page Name	Definition Name	Navigation	Usage
Phone Usage	PHONE_USAGE_TABLE	<ul style="list-style-type: none"> Click the Phone Usage link on the FA Process Demographic Use page. Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table, Phone Usage 	Define phone usages to specify the hierarchies of telephone types to search for and use in a specific usage.

Setting Up Process Demographic Data for CRC

Access the FA Process Demographic Data page (Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use).

FA Process Demographic Use

Process Demo Setup
[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

	Process Name	Address Usage	Perm Addr Usage	Mail Addr Usage	Name Usage	Phone Usage	Email Usage		
1	Award Notification	SLCT ORD 1			NAME USG 1				+ -
2	ISIR Processing	SLCT ORD 1			NAME USG 1	RPT_PHON	RPT_EMAIL		+ -
3	Loan Processing		SLCT ORD 1	SLCT ORD 2	NAME USG 1				+ -

[Address Usage Table](#)
[Name Usage Table](#)
[Phone Usage Table](#)

FA Process Demographic Use page

The system displays settings defined by Campus Community components.

Address Usage Used to select the address used by the associated process. Not used for loans.

Perm Addr Usage Used to select the permanent address for loan processing.
(permanent address usage)

Mail Addr Usage (mail Used to select the temporary address for loan processing.
address usage)

Name Usage Used to select the name for use by the associated process. For loans, this selects the name for the student and borrower.

Phone Usage . Used to select the phone number for use by the associated process.

Email Usage	Indicates the type of email address, such as home, business, dorm, or campus. Used to select email usage table settings defined in Campus Community setup.
Address Usage Table	Click to access the Address Usage page to define or review address usages.
Name Usage Table	Click to access the Name Usage page to define or review name usages.
Phone Usage Table	Click to access the Phone Usage page to define or review phone usages.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Page Used to Establish Address Usages

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Name Usages

Setting Up Certification Requests for CRC

This section discusses how to define search match criteria for CRC.

Page Used to Set Up Certification Requests

Page Name	Definition Name	Navigation	Usage
CRC Search/Match Parameters	SFA_CRC_SRCHMCH	Setup SACR, Product Related, Financial aid, Loans, CR CommonLine, Create CRC Search Match Setup, CRC Search/Match Parameters	Define search match criteria for the CRC Inbound process.

Defining Search Match Criteria for CRC

Access the Create CRC Search/Match Parameters page (Setup SACR, Product Related, Financial aid, Loans, CR CommonLine, Create CRC Search Match Setup, CRC Search/Match Parameters).

CRC Search/Match Parameters			
*Institution:	PSUNV		
*Search Parameter:	PSCS_FA_CRC	Financial Aid CRC	
No Match - Only for PLUS loans			
New:	Add	Assign ID	Ignore
	<input checked="" type="radio"/>		<input type="radio"/>
Match(es) Found			
Find View All First 1-2 of 3 Last			
Order Nbr:	10	Last,First, M, SSN, Birthdate	
One Match:		<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr:	20	CRC Last, SSN, Birthdate	
One Match:		<input checked="" type="radio"/>	<input type="radio"/>

CRC Search/Match Parameters page

You must first define the search parameters and rules that the Search Match process uses for the certification request process. The available fields in the certification request record that Search Match can use are national ID (SSN), last name, first name, middle initial, and birthdate.

Add Indicates that if the system does not find an EmplID, then it should create one. The system only offers this to the parent for PLUS loans.

Assign ID Indicates that the system use the EmplID found during the search match. The option is not available for No Match if the system does not find an EmplID to assign. The Assign ID can represent either a student or a parent.

Note. The No Match - Only for PLUS loans group box only applies when the search match process cannot find an EmplID for the parent. The system uses the Match(es) Found section criteria for both student and parents when search match is called.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Search/Match"

Reviewing Loan Action Codes for CRC

To set up these codes for CRC, use the Maintain CRC Loan Action Codes component (SFA_CRC_ACTION_CD).

While most of the CommonLine action codes are shared between CL4 and CRC, CRC specific codes exist which must be maintained separately.

This section discusses how to review loan action codes.

Page Used to Review Loan Action Codes

Page Name	Definition Name	Navigation	Usage
CRC Loan Action Codes	SFA_CRC_ACTION_CD	Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Maintain CRC Loan Action Codes, Loan Action Code Table	View CRC specific status codes and descriptions.

Reviewing Loan Action Codes

Access the Loan Action Code Table page (Set Up SACR, Product Related, Financial Aid, Loans, CR CommonLine, Maintain CRC Loan Action Codes, Loan Action Code Table).

Loan Action Code Table

Loan Program: F FFELP

Loan Action Type: G Guarantor

Loan Action Codes				Find View All	First	1-3 of 3	Last
*Loan Action CD	Description	Short Description	Loan Action Category				
01	Not sent to guarantor.	Not sent	Status				+ -
05	Sent to guarantor	Sent	Status				+ -
10	Received by guarantor	Received	Status				+ -

Loan Action Code Table page

CRC specific status codes are stored in this component. You should not have to add or delete loan action codes, but you can modify the descriptions. Four loan action types are available: Guarantor, Lender, PNote (Promissory Note), and Credit. Loan action codes that are common to both CL 4 and CRC loans are stored in the CL 4 action code table.

Loan Action Category The values are: *Accept, Reject, and Status*.

Chapter 12

Setting Up Direct Loans

You set up Direct Loans as mandated by the U.S. Department of Education. This chapter provides an overview of direct lending, lists prerequisites, and discusses how to:

- Set up financial aid item types.
- Set up promissory notes in Campus Community.
- Set up direct lending.
- View system administration information.

Overview of Direct Lending

The William D. Ford Federal Direct Loan program was established to provide long-term academic loans to qualified students who are enrolled in facilities of higher education, vocational, technical, business and trade schools. The Federal Government provides the funds for direct loans directly to the student, bypassing an outside lender. Students who receive federal direct loan funds cannot receive FFEL (federal family education loan) funds during the same enrollment period.

The three types of direct loans are:

<i>Direct Loan Type</i>	<i>Loan Characteristics</i>
Direct Subsidized Stafford Loan	A student's eligibility for a Direct Subsidized Stafford loan is determined entirely on the student's ability to demonstrate financial need. The U.S. Department of Education subsidizes the interest; therefore, the borrower is not charged interest while they are enrolled in school at least half time, and during grace and deferment periods.
Direct Unsubsidized Stafford Loan	A student is eligible for a Direct Unsubsidized Stafford loan regardless of their financial situation. Borrowers are responsible for paying the interest on these loans.

<i>Direct Loan Type</i>	<i>Loan Characteristics</i>
Direct PLUS Loan	<p>Direct PLUS loans enable parents to borrow on behalf of their dependent students who are enrolled at least half time. Borrowers are responsible for paying the interest on these loans.</p> <p>Direct Graduate/Professional PLUS loans, or Grad PLUS loans, are intended for graduate or professional students who borrow money for themselves. The award amount equals the COA less any financial aid for FAFSA applicants.</p>

The direct lending portion of the Financial Aid package is designed to help you process the Subsidized Stafford, Unsubsidized Stafford, and PLUS loans awarded to students attending your institution.

Before You Begin

Before you attempt to process Direct Loans, ensure that the following general Financial Aid items are setup.

- Start and end dates for your academic year on the Aid Year Table page, which are reported to COD (common origination and disbursement) on the origination file.
- Valid terms for your careers on the Valid Terms for Career page.

The Loan Period Start and End dates must be accurately entered on this page. When the loan origination record is built, the loan period is calculated using the earliest loan period start and latest loan period end dates from the terms contained within the disbursement plan assigned to the loan award.

- Aggregate areas for each type (subsidized and unsubsidized) of direct loan on the Aggregate Aid Limit Table page.
- Disbursement Split Codes and disbursement split code formulas.

A specific disbursement split code formula is required to support the disbursement feature that allows up to 20 disbursements for Stafford loans and provides the ability to reserve disbursements for post-disbursement adjustments. Stafford loans allow up to 20 disbursements, however, PLUS loans allow only four.

Setting Up Financial Aid Item Types

You use the Financial Aid Item Types component to set up financial aid item types, as described in the chapter on setting up Packaging basics; this section is provided to help you select the correct values for Direct Loan financial aid item types. Only information specific to direct lending setup is provided.

This section discusses how to:

- Define financial aid item types.
- Set up financial aid item type awarding rules.
- Set up financial aid item type award attributes.

- Set up financial aid item type award limits.
- Set up financial aid item type disbursement rules.
- Set up financial aid item type loan fees.

Pages Used to Set Up Financial Aid Item Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.
FA Item Type 6 page	ITEM_TYP_FA_LN_FEE	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6	Attach loan fee codes for loan item types.

Defining Financial Aid Item Types

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

FA Item Type 1 page

This table describes how to enter field information for each type of direct lending loan.

<i>Field</i>	<i>Subsidized Stafford</i>	<i>Unsubsidized Stafford</i>	<i>PLUS</i>	<i>Graduate PLUS</i>
Description	Enter a descriptive statement indicating a Direct Subsidized Stafford loan.	Enter a descriptive statement indicating a Direct Unsubsidized Stafford loan.	Enter a descriptive statement indicating a PLUS loan.	Enter a descriptive statement indicating a Graduate PLUS loan.
Financial Aid Type	<i>Loan</i>	<i>Loan</i>	<i>Loan</i>	<i>Loan</i>
Source	<i>Federal</i>	<i>Federal</i>	<i>Federal</i>	<i>Federal</i>
Federal ID	<i>Subsidized</i>	<i>Unsubsidized</i>	<i>PLUS</i>	<i>Grad PLUS</i>
Aggregate Area	Name of the aggregate area you set up for this type of loan.	Name of the aggregate area you set up for this type of loan.	Leave this field blank.	Leave this field blank.

Setting Up Financial Aid Item Type Awarding Rules

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2).

The screenshot displays the 'FA Item Type 2' configuration page. At the top, there are tabs for 'FA Item Type 1' through 'FA Item Type 6', with 'FA Item Type 2' selected. Below the tabs, the following information is shown:

- SetID:** PSUNV
- Item Type:** 900000000311 [Direct Sub Stafford](#)
- Aid Year:** 2008 Federal Aid Year 2007 - 2008

The main section is titled 'Awarding Rules' and includes a search bar with 'Find | View All' and a pagination indicator 'First 1 of 1 Last'. The configuration is divided into two main areas:

Effective Date: 01/28/2005 **Status:** Active

Fed/Inst Affected: Both Fed and Inst (dropdown menu)

Meet Need/Cost: Straight Need/Cost (dropdown menu)

Packaging Methodology: Federal Methodology (dropdown menu)

Selection Criteria: (text input field with a search icon)

Rounding Rules (sub-section):

- Rounding Option:** Dollar (dropdown menu)
- Round Direction:** Nearest (dropdown menu)
- Award Remainder Rule:** Last-Dllrs (dropdown menu)
- Fee Remainder Rule:** (dropdown menu)
- ☒ **Truncate Fees**

Below these sections, there are several checkboxes for additional rules:

- ☒ **Need Based**
- ☒ **Auto Package**
- ☐ **Self Help Award**
- ☐ **Package Only Once**
- ☐ **Lock Award**
- ☐ **Equity Award**
- ☐ **Don't Repackage**
- ☐ **Disbursement Protection**
- ☐ **Adjust while in transit**

FA Item Type 2 page

The field values entered on this page are the same for all Direct Loan types.

Fed/Inst Affected Select *Both Fed and Inst* (both federal and institution).

Meet Need/Cost Select *Straight Need/Cost*.

Rounding Option Select *Dollar*.

Round Direction Select *Nearest*.

Award Remainder Rule Select *Last-Dllrs* (last dollars).

Fee Remainder Rule Leave this field blank.

Truncate Fees Select this check box.

Need Based Select this check box.

Auto Package Select this check box.

Setting Up Financial Aid Item Type Award Attributes

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

FA Item Type 1		FA Item Type 2		FA Item Type 3		FA Item Type 4		FA Item Type 5		FA Item Type 6	
SetID:	PSUNV										
Item Type:	900000000311 Direct Sub Stafford										
Aid Year:	2008 Federal Aid Year 2007 - 2008										
Award Attributes Find View All First 1 of 1 Last											
Effective Date:	01/28/2005			Status:	Active						
Pass Anticipated Aid:	Accepted			Anticip Aid Expiration Days:	30						
Disbursement Method:	Stdnt Acct			Auto Cancel Item Type:	<input type="text"/>						
<input type="checkbox"/> Signature Required				<input type="checkbox"/> Manual Authorization				<input type="checkbox"/> Include in Transcript			
Print Letter Option:	Print			<input checked="" type="radio"/> Print as Award Item				Self Service Actions			
Award Letter Print:	<input type="text"/>			<input type="radio"/> Print as Other Resource				<input checked="" type="checkbox"/> Accept <input checked="" type="checkbox"/> Reduce <input checked="" type="checkbox"/> Decline			
Award Message:	<input type="text"/>										

FA Item Type 3 page

The fields on this page are used to set up disbursement information. Set up these fields according to your institution's requirements. No specific Direct Loan requirements exist.

Setting Up Financial Aid Item Type Award Limits

Access the FA Item Type 4 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4).

FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID: PSUNV
Item Type: 900000000311 [Direct Sub Stafford](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

Award Limits by Term Category
Find | View All
First 1 of 1 Last

Effective Date: 01/28/2005 Status: Active

*Term Category	*Minimum	*Maximum		
Medical Level 1	150.00	8,500.00	+	-
Regular Term	150.00	8,500.00	+	-
Summer Term	150.00	8,500.00	+	-

FA Item Type 4 page

The fields on this page are used to set up your award limits by term category. Your institution defines the limits. No specific Direct Loan requirements exist.

Setting Up Financial Aid Item Type Disbursement Rules

Access the FA Item Type 5 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5).

FA Item Type 1
FA Item Type 2
FA Item Type 3
FA Item Type 4
FA Item Type 5
FA Item Type 6

SetID: PSUNV
Item Type: 900000000311 [Direct Sub Stafford](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

Disbursement Rules
Find | View All
First 1 of 1 Last

Effective Date: 01/28/2005 Status: Active
Missing Term Enrollment: ☒ Split evenly across valid term

Default Disbursement Splits
Customize | Find |
First 1-2 of 2 Last

*Academic Institution	*Academic Career	*Disbursement Plan	*Split Code		
PSUNV	GRAD	D1	01	+	-
PSUNV	UGRD	D1	01	+	-

FA Item Type 5 page

The field values entered on this page are the same for all direct lending loan types.

Missing Term Enrollment

Select the Split evenly across valid term check box for Direct Loan setup. Disbursement plans determine the disbursements across terms, but students might not attend all terms defined for the disbursement plan. The Missing Term Enrollment rule allows you to specify whether to split disbursements evenly among the remaining terms for which the student is actually enrolled.

For example, if the disbursement plan is for fall, winter, and spring quarters, but the student is only enrolled for fall and spring with the Split evenly across valid term check box selected, the award amount is split evenly between the fall and spring terms.

Setting Up Financial Aid Item Type Loan Fees

Access the FA Item Type 6 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6).

FA Item Type 1 FA Item Type 2 FA Item Type 3 FA Item Type 4 FA Item Type 5 **FA Item Type 6**

SetID: PSUNV
Item Type: 900000000311 [Direct Sub Stafford](#)
Aid Year: 2008 Federal Aid Year 2007 - 2008

Loan Program Find | View All First 1 of 1 Last

Effective Date: 01/28/2005 Status: Active

Loan Program: Direct Lending Loan Interest Attribute: Subsidized

Loan Fees Customize | Find | First 1-2 of 2 Last

	Loan Fee		Loan Fee Type	Loan Fee Rule	Loan Fee Option	Fee Percent	Flat Fee		
1	DL	DIRECT LOAN SUB AND UNSUB	P	Acrss Disb	Percentage	3.00		+	-
2	DLR	DIRECT LOAN REBATE	R	Acrss Disb	Percentage	1.50		+	-

FA Item Type 6 page

Before you set up this page for your direct lending item types, you must create a loan fee type for your Stafford subsidized, Stafford unsubsidized, and PLUS loan types. You must also create a loan fee type for the rebate.

Field	Subsidized Stafford	Unsubsidized Stafford	PLUS or Graduate PLUS
Loan Program	Ensure that this field displays <i>Direct Lending</i> . The value comes from the aggregate area that you select on the Financial Aid Item Type 1 page.	<i>Direct Lending</i>	<i>Direct Lending</i>

Field	<i>Subsidized Stafford</i>	<i>Unsubsidized Stafford</i>	<i>PLUS or Graduate PLUS</i>
Loan Interest Attribute	Ensure that this field displays <i>Subsidized</i> for subsidized Stafford loans. The value comes from the aggregate area you select on the Financial Aid Item Type 1 page.	Ensure that this field displays <i>Unsubsidized</i> for subsidized Stafford loans.	Ensure that this field displays <i>Unsubsidized</i> for PLUS or Graduate PLUS loans.
Loan Fees	Select your direct lending fee ID for subsidized Stafford loans.	Select your direct lending fee ID for unsubsidized Stafford loans.	Select your direct lending fee ID for PLUS or Graduate PLUS loans.
Loan Fees (interest rebate)	Insert a row to add interest rebate for the loan. Select the direct loan rebate fee that you set up on the Loan Fee Table page. The up-front interest rebate amount of 1.5 percent of the gross disbursement is calculated at the disbursement level for each direct subsidized, direct unsubsidized, and direct PLUS loan. The rebate amount is added after the loan fee percent is subtracted from the gross disbursement amount.	Same as for subsidized Stafford.	Same as for subsidized Stafford.
Fee Percentage	The loan fee values are derived from the Loan Fee Table.	3% The loan fee values are derived from the Loan Fee Table.	4% The loan fee values are derived from the Loan Fee Table.

Example of How the Direct Loan Rebate Works

A student receives a Direct Loan of 1,000.00 USD for the fall 2008 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent rebate of 15.00 USD is added back.

Setting Up Promissory Notes in Campus Community

Before using Master Promissory Notes (MPN) and Promissory Notes, you must complete setup procedures in PeopleSoft Enterprise Campus Community and Financial Aid. The information in this section is specific to direct lending.

If you use the Create PNote Communication and Print Promissory Note processes, you can link a loan type to a specific document type.

If you have multiple loan types per loan program, you can have one checklist per loan type or you can have one checklist for all the loan types within a particular loan program.

Before setting up PeopleSoft Enterprise Campus Community items for promissory notes, you should be familiar with and understand the 3Cs (communications, checklists, and comments), specifically checklists.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Understanding the 3Cs — Communications, Checklists, and Comments."

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Checklists," Understanding Checklist Setup.

This table lists the items that you must create in PeopleSoft Enterprise Campus Community before you can use Master Promissory Notes (MPN) and Promissory Notes in PeopleSoft Enterprise Financial Aid.

Important! You must complete the setup procedures for the items listed in this table to successfully print promissory notes and loan packages.

<i>Item</i>	<i>Direct Loan Information</i>	<i>Reference</i>
Checklist Item	Create one checklist item code each for direct Stafford loan and direct PLUS loan type. Note. Be sure to use an effective date of 01/01/1900 for any rows you add.	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Checklists," Defining Checklist Items.
Checklist Item Function	For the Administrative Function of <i>Loan</i> , insert a row for each of the checklist items that you created.	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Checklists," Defining Checklist Items.
Checklist	Create one checklist each for direct Stafford loan and direct PLUS loans. Graduate PLUS loans can use the same elements as PLUS loans.	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Checklists," Creating a Checklist Template.

Item	Direct Loan Information	Reference
Checklist 3C Groups	Enter values in the Update/Inquiry Group. The Update/Inquiry Group values are user defined.	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Checklists," Setting Up Checklist 3C Groups.
Communication Contexts	<p>Set up a Communication Context for each checklist. Use these values:</p> <ul style="list-style-type: none"> • Method = <i>Document</i> • Direction = <i>Outgoing</i> • Letter Code = <i>Loan Promissory Notes</i>. <p>Note. The letter code is defined on the Standard Letters page in Campus Community.Set Up SACR, Common Definitions, Communications, Standard Letter Table CS.</p>	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Communications," Defining Communication Contexts and Categories.
Communication Categories	<p>Choose the Communication Category designated for promissory note processing. For example, PNT_08 (Pnotes for 2008).</p> <p>Use these values:</p> <ul style="list-style-type: none"> • Function = <i>Loan</i> • Communication Context = Insert rows for each of the communication contexts that you created. <p>Note. Be sure to use an effective date of 01/01/1900 for any rows that you add.</p>	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Communications," Defining Communication Contexts and Categories.
Communication 3C Groups	<p>Select the Communication Category that you set up for promissory notes. For example, PNT_08.</p> <p>For the 3C Update/Inquiry Group field, select the 3C group to which to give access for the selected communication category. This field is required for promissory note processing</p> <p>Warning! If you do not set security, users have access to the communication category and administrative function needed to run the promissory notes functionality.</p>	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Communications," Defining 3C Groups.

Item	Direct Loan Information	Reference
Communication Speed Keys	<p>Add new Communication Keys for MPN and PLUS loans. When adding the Communication Comm Keys, select <i>Loan</i> as the administrative function.</p> <p>Enter or select the values for each of the listed fields.</p> <p>Comm Key. Enter <i>MPN</i> for the MPN communication key, <i>PLUS</i> for the PLUS communication key. For Health, Perkins, and university/institutional loans, give each a unique communication key.</p> <p>Category. Enter the category you set up for MPN and PLUS loan communication categories. This value should match the name of the communication category that you set up previously.</p> <p>Context. Enter <i>MPN</i> for the MPN context field, <i>PLUS</i> for the PLUS context field.</p> <p>Method. Select the method to use to deliver the promissory note. This should match the method used when setting up the context.</p> <p>Direction. Select the direction, from your institution's point of view, that the promissory note is going. For example, outgoing refers to something sent out from your institution. This should match the method used when setting up the context.</p> <p>Letter Code. Select the appropriate letter code for the type of promissory note. You can have one letter code type for all loan type, for example, a letter code of LNS (loans).</p>	See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i> , "Setting Up Communications," Defining Communication Speed Keys.

Setting Up Direct Lending

To set up direct lending, use these components:

- Maintain EDI Transactions component (FA_ECTTRANS).
- Create Loan Destinations component (LN_DEST_PROFILE).
- Direct Loan Change Rules component (LN_DL_INST_PARM).
- Define Loan Institutions component (LOAN_INST_TABLE).
- Maintain Loan Report Packages component (LOAN_RPT_PKGS02).
- Define Serial Promissory Notes component (LN_PNOTE_TYPE).
- Define School Servicers component (LOAN_SERVICE_TABLE).
- Maintain Loan Transfer ID component (LN_XFER_FILE_ID).
- Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- View EDI profile defaults.
- Set up loan destination profiles for Direct Lending.
- Set up global Direct Lending change parameters.
- Set up Loan Institution Table for Direct Lending COD.
- Set up destination defaults for Direct Lending.
- Set up loan report packages for Direct Lending.
- Set up DL Serial Promissory Note table.
- Set up Loan Servicer table for Direct Lending.
- Set up loan transfer IDs for Direct Lending.
- Set up loan types for Direct Lending.

Pages Used to Set Up Direct Lending

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Financial Aid EDI Transactions	FA_ECTTRANS	Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions	Define electronic data transactions.
Loan Dest Profile	LOAN_DEST_PROFILE	Set Up SACR, Product Related, Financial Aid, Loans, Commonline 4, Create Loan Destinations, Loan Dest Profile	Define the participants your institution uses to exchange loan application data. You can designate multiple destinations for a given loan program.
Ln DI Inst Parm (loan direct lending institution parameter)	LN_DL_INST_PARM	Set Up SACR, Product Related, Financial Aid, Loans, Direct Loan Change Rules, Ln DI Inst Parm	Set up change parameters for your institution. By setting change parameters for specific fields, you can determine how direct lending change processing handles the specified fields.
Ln Pnote Type (loan promissory note type)	LN_PNOTE_TYPE	Set Up SACR, Product Related, Financial Aid, Loans, Define Serial Promissory Notes, Ln Pnote Type	Add the master promissory note (MPN), PLUS note, health, Perkins, and university/institutional loan types to the loan promissory note table. You must do this before using the promissory note functionality.

Page Name	Definition Name	Navigation	Usage
Loan Institution Table	LOAN_INST_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table	Set up Common Origination and Disbursement (COD) for Direct Lending. Define how your school processes loans for the academic year. You must define your loan processes for each academic career at your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Enter address information for your department that works with loans.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Enter address information for your loan contact personnel.
Loan Destination Default	LOAN_INST_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default	Set up your default loan destination parameters.
Loan Report Packages	LN_RPT_PCKG02	Set UP SACR, Product Related, Financial Aid, Loans, Maintain Loan Report Packages, Loan Report Packages	Define and associate loan document types to loan types.
Loan Servicer Table	LOAN_SERVICE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine4, Define School Servicers, Loan Servicer Table	Identify the servicers that your institution uses for processing loans. You can also use this page to add a new servicer.
Servicer Electronic Address	SERV_ADDR_SEC	Click the Electronic Address link on the Loan Servicer Table page.	Enter an email address for the loan servicer.
Servicer Contact Information	SERV_ADDR_SEC	Click the Contact Address link on the Loan Servicer Table page.	Enter address and email information for the individual contact that you entered on the Loan Servicer Table page.
Loan Transfer IDs	LN_XFER_ID_UPDT	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs	Set up your EC transaction ID for all inbound and outbound loan file transactions.

Page Name	Definition Name	Navigation	Usage
Loan Type Table	LOAN_TYPE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table	Enter specific processing types and loan requirements for a particular loan type. You can also associate specific loan item types to the loan type.
Direct Loan Options	LOAN_TYPE_TABLE_DL	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Direct Loan Options	Specify direct lending options for the loan type setup. This page is used to define your disbursement options from Financial Aid to PeopleSoft Enterprise Student Financials. Additional options define when disbursements are transmitted to the Common Origination and Disbursement (COD).
Checklist Setup	LOAN_TYPE_DOCUMENT	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup	Define checklist to be associated with loan type.

Viewing EDI Profile Defaults

Access the Financial Aid EDI Transactions page (Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions).

Financial Aid EDI Transactions					
Customize Find View 100 First 91-99 of 192 Last					
*EC Transaction ID	*In/Out	Description	FA Use		
DISF98OP	Inbound	DL Full Loan Orig Acknwldg	Direct Ln	+	-
DSAS00OP	Inbound	Direct Loan School Acct Stmt	Direct Ln	+	-
DSAS01OP	Inbound	DL School Acct Stmt '01	Direct Ln	+	-
DSAS02OP	Inbound	DL School Acct Stmt '02	Direct Ln	+	-
DSDF03OP	Inbound	DL Schl Acct Stmt Disb '03	Direct Ln	+	-
DSDF04OP	Inbound	DL Schl Acct Stmt Disb '04	Direct Ln	+	-
DSDF05OP	Inbound	DL Schl Acct Stmt Disb '05	Direct Ln	+	-
DSDF06OP	Inbound	DL Schl Acct Stmt Disb '06	Direct Ln	+	-
DSDF07OP	Inbound	DL Schl Acct Stmt Disb '07	Direct Ln	+	-

Financial Aid EDIT Transactions page

The EDI Profile table defines electronic data transactions both inbound and outbound for COD processing. PeopleSoft Student Administration uses the EDI functionality to exchange data from the COD system to PeopleSoft Student Administration. EDI transactions support data files for Direct Loans and Pell Grant. The system updates and populates the EC Transaction ID on a regulatory basis.

EC Transaction ID The ID is based on the message classes used for direct lending. See the *COD Technical Reference* for further information. Use the Add link to add additional EC transaction IDs for this partner profile. Add all the direct lending message classes that you use at your institution.

In/Out The system indicates whether the file is *Inbound* or *Outbound*.

Direct Lending EC Transaction IDs

The following table illustrates the value provided in your system for Direct Lending processing. File types are updated during annual regulatory releases for Direct Lending.

<i>EC Transaction ID</i>	<i>Inbound/Outbound</i>	<i>Data Exchange</i>	<i>File Type Data Definition</i>
DSLFnnOP, where nn is the aid year.	Inbound	Import From COD	School Account Statement (Fixed-Length, Loan Level Loan Detail)
DSDFnnOP, where nn is the aid year.	Inbound	Import from COD	School Account Statement (Fixed-Length, Disbursement Level Loan Detail)

Setting Up Loan Destination Profiles for Direct Lending

Access the Loan Dest Profile page (Set Up SACR, Product Related, Financial Aid, Loans, Commonline 4, Create Loan Destinations, Loan Dest Profile).

Loan Dest Profile		CommonLine Options		Loan Dest Edits		
Aid Year: 2008		Financial Aid Year 2007 - 2008		Institution: PSUNV		
Loan Destination Profile						
Destination:	38	Loan Program:	Direct	Tolerance:	0.00	
Description:	DIRECT LENDING 2004		Short Description:	DL_2004		
Destination Components						
Guarantor ID:		OE Cd:		Ovrd	<input type="checkbox"/>	
Lender ID:		OE Cd:		Branch:		
Servicer ID:	2	DL Srvc	OE Cd:	000000	Branch:	0000
Physical Destination:	Servicer					
Loan Print Option:	School Prints					
				Pre Guarantee Contact:	Servicer	
				Pre-Disb Contact:	Servicer	
				Post Disb Contact:	Servicer	
Valid Category/Process Level Find View All First 1-2 of 3 Last						
Loan Category:	PLUS	<input type="checkbox"/> Track PN	Proc. Level:	Direct	+ -	
Loan Category:	Subsidized	<input checked="" type="checkbox"/> Track PN	Proc. Level:	Direct	+ -	

Loan Dest Profile (loan destination profile) page

Loan Destination Profile

- Destination** The system assigns and displays a unique numeric identifier when you create a destination.
- Loan Program** This should display *Direct* for direct lending.
- Tolerance** Enter the tolerance value to determine the amount difference that the system should allow with loans.

Destination Components

- Guarantor ID** This field does not apply to direct loans.
- Lender ID** This field does not apply to direct loans.
- Servicer ID** Select the servicer ID for direct lending. This value is delivered with your system.
- OE Cd Branch** (Office of Education code branch) The system displays the OE Cd and Branch for the Servicer ID that you select.
- Physical Destination** Select *Servicer* for direct lending. The physical destination refers to the destination that you intend to receive the loan application.
- Loan Print Option** Select the appropriate option depending on your institution's arrangement with COD.

Ovrd (override) Select this check box to save the page without having designated a Guarantor ID, Lender ID, and Servicer ID. But, this does not apply to direct lending, so you can save the page with only the Servicer ID without selecting this check box.

Contact Order

The fields in this group box determine who to contact depending on the stage of the loan.

Pre-Guarantee Contact Select *Servicer* for direct lending.

Pre-Disb Contact (pre-disbursement contact) Select *Servicer* for direct lending.

Post Disb Contact (post-disbursement contact) Select *Servicer* for direct lending.

Valid Category/Process Level

Loan Category Identify the loan category for the loan destination to process. The loan categories include *PLUS*, *Sub/Unsub*, *Subsidized*, and *Unsub*. The category *Sub/Unsub* does not apply to direct lending. Direct lending institutions should use *Subsidized*, *Unsub*, and *PLUS*. You should add a loan category for all three Direct Lending loan types: subsidized, unsubsidized, and PLUS.

Track PN (track promissory note) This field does not apply to direct lending.

Proc. Level (process level) Identify the loan processing level that the loan destination performs for the corresponding loan category. For direct lending, select *Direct* for all of your loan categories.

Note. The other two pages in this component, CommonLine Options and Loan Dest Edits, do not apply to direct lending.

Setting Up Global Direct Lending Change Parameters

Access the Ln DI Inst Parm page (Set Up SACR, Product Related, Financial Aid, Loans, Direct Loan Change Rules, Ln DI Inst Parm).

Ln DI Inst Parm

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2008 Financial Aid Year 2007 - 2008

DL Change Parameters
Find | View All First 1 of 1 Last

Chg Field#	Description	DL Change Type	Change Parm
P002	Student SSN	Demographic	Suspend

Ln DI Inst Parm (loan direct lending institutional parameters) page

You can use this setup page to set globally what data changes should be automatically submitted to COD. These data changes can be for a change file, for a record held for institutional review, or for an automatically suspended record because of reductions to financial data. After these global parameters are defined, they are applied to all direct loan records to which changes to data have been made. This global setup assists you in administering what and when multiple data changes should be submitted to COD.

The global setup does not preclude you from holding/suspending change information on a student-by-student level. Individual suspend, change, or hold decisions can be made through the DL Stu Change Hold/Suspense page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change Data).

The system displays the Academic Institution and Aid Year.

DL Change Parameters

Chg Field # (change field number) Select the field to change. The change field numbers correspond to those assigned by COD, as defined in the *COD Technical Reference*.

DL Change Type Indicates whether the specified change field number represents a demographic or financial change.

Change Parm (change parameter)

Select the parameter for each field.

No Chg (no change). The system does not consider the specified field during change processing. When you make changes to fields to which this change parameter is assigned, the system does not create a change transaction.

Spnd Red (suspend reduced). This is used for financial change types only. If the change results in a reduced disbursement amount, the system suspends the loan.

Suspend When you make changes to fields to which this change parameter is assigned, the system creates a change transaction and places the loan on hold. This enables you to review the loan to determine whether the change is appropriate. If the change is fine, you can remove the hold.

Note. The above change parameters affect those loans that have been transmitted to the COD. Prior to submission, you can change the fields on the loan record without generating a change transaction. Change transactions occur when you make changes to loans that you have previously transmitted to COD.

Setting Up Loan Institution Table for Direct Lending COD

Access the Loan Institution Table page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table).

Loan Institution Table		Loan Destination Default	
Academic Institution:	PSUNV	PeopleSoft University	
Aid Year:	2008	Financial Aid Year 2007 - 2008	
School Code	Branch	Description	Short Description Career
001315	00	PEOPLESFT UNIVERSITY	PEOPLESFT Undergrad
Loan Processing Info			
FFELP/Direct Participant:	All Loans	DUNS ID:	123456789
DL Disclosure Print:	LOC	DL SchCd:	G01315
SSN Source:	CC	COD Common ID:	001315
<input checked="" type="checkbox"/> Full Participant		<input checked="" type="checkbox"/> DL Serial MPN Activation	
		<input type="checkbox"/> EDE Special School	
Institution Address			
Contact Information Find View All First 1 of 1 Last			
Contact Nbr:	1	Name:	WOODLEY,BRENDA
		Title:	COORDINATOR
		Func Area:	LOAN
Loan Institution Contact			

Loan Institution Table page

The system displays the Academic Institution,Aid Year,School Code,Branch, descriptions, and Career.

Loan Processing Info

FFELP/Direct Participant	Indicate whether your loan institution can originate <i>All Loans</i> (both FFELP and direct lending) <i>Direct</i> (Lending only), or <i>FFELP</i> (only). Alternative loans are not affected by this setting.
DL Disclosure Print	Indicate where the loan disclosure is printed. Select from <i>COD</i> , <i>Reprint</i> , and <i>School.Reprint</i> indicates that the Department of Education has authorized the institution to reprint copies of the Direct Loan Disclosure Statement. In most cases, you should select COD.
SSN Source	Indicate the source for the student's Social Security Number, <i>CC</i> (Campus Community) or <i>ISIR</i> .
DUNS ID (data universal numbering scheme)	Enter your DUNS ID. The Department of Education assigns the DUNS number to the reporting institution.
DL SchCd (direct lending school code)	Enter your school code for direct lending. This field is hidden if your school does not participate in the direct lending program.
COD Full Participant	Select to activate the SFA Common School ID field. Enter your Common School ID number that is assigned to your institution by the U.S. Department of Education.
DL Serial MPN Activation (direct lending serial master promissory note activation)	Select this check box regardless of how your school processes Direct Loans. This field is hidden if your school does not participate in the direct loan program. If this field is hidden and your school does participate in the direct loan program, review your setup on the Installation Defaults, Fin Aid page.
EDE Special School	Select this check box if your institution as been approved as an EDE special school.

Contact Information

In this group box, enter the contact information for each of your financial aid administrators in charge of loan processing.

Cntact Nbr (contact number)	Use this number to prioritize the list of contacts. The person with a contact number of one is considered the primary contact.
Name	Enter the name of the loan officer.
Title	Enter the title of the loan officer.
Func Area (functional area)	Enter information about the functional area that this contact person administrates.

Entering Loan Institution Address Information

Access the Loan Institution Address Information page (click the Loan Institution Contact link on the Loan Institution Table page).

Loan Institution Address Information
Institution Address

Country:  United States

Address: 15821 VENTURA BLVD
ENCINO, CA 91436 [Edit Address](#)

***Mailbox Type:**

Mailbox ID:

Loan Institution Address Information page

Enter the required address information. Select a Mailbox Type of either *Internet* or *Compuserve*. Enter a Mailbox ID or email address. The Mailbox Type and Mailbox ID are used to determine where data files are sent when the files are transmitted using the internet or a private communication network.

Note. You must enter a Mailbox Type and Mailbox ID to save this page.

Entering Loan Institution Contact Information

Access the Loan Institution Contact Information Loan Institution Contact page (click the Loan Institution Contact link on the Loan Institution Table page).

Loan Institution Contact Information

Loan Institution Contact

Country:

USA

United States

Address:

123 Pine St.
Anytown, CA 90123

[Edit Address](#)

Mailbox Type:

Internet

Mailbox ID:

Mailbox@mailbox.com

OK

Cancel

Refresh

Loan Institution Contact Information page

Enter the required address information for the individual loan contact. Select a Mailbox Type of either *Internet* or *Compuserve*. Enter the Mailbox ID or email address.

Setting Up Destination Defaults for Direct Lending

Access the Loan Destination Default page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default).

Loan Institution Table		Loan Destination Default		
Academic Institution:	PSUNV	PeopleSoft University		
Aid Year:	2008	Financial Aid Year 2007 - 2008		
School Code	Branch	Description	Short Description	Career
001315	00	PEOPLESOFT UNIVERSITY	PEOPLESOFT	Undergrad

Default Loan Destination Parameters	
Find View All First 1 of 3 Last	
'Loan Program:	Direct
1. Current Prom Note 2. Current Year Originations 3. Student Selected Lender 4. <input type="checkbox"/> Check Prior Year's Destination 5. <input type="checkbox"/> Check NSLDS for Guarantor 6. Default Destination <input type="checkbox"/> Use CRC Destination <input type="text"/>	

Loan Destination Default page

Default Loan Destination Parameters

Loan Program Select *Direct* for direct lending.

6. Default Destination Indicates the default loan destination. Select the loan destination number that you created for this processing year for direct lending COD. The loan destination number is created on the Loan Dest Profile page.

Note. The 1. Current Prom Note, 2. Current Year Originations, 3. Student Selected Lender, 4. Check Prior Year Originations, and 5. Check NSLDS for Guarantor fields do not apply to direct lending.

Setting Up Loan Report Packages for Direct Lending

Access the Loan Report Packages page (Set UP SACR, Product Related, Financial Aid, Loans, Maintain Loan Report Packages, Loan Report Packages).

Loan Report Packages

Report Package: POSITIONAL **Aid Year:** 2008 **Ln Output Type:** Positional
Description: POSITIONAL - 2008 **Short Desc:** POSITIONAL
Ext Ovr d Parm: **Field Delimiter:**
Input/Output file:

Rpt Seq	Document Type	File Name	Loan Type		
1	Health Professional PNote		HL_1		
2	Health Professional PNote		HL_2		
3	Health Professional PNote		HL_3		
4	Health Professional PNote		HL_4		
5	Master PNote		DSUB		
6	Master PNote		DSQT		
7	Master PNote		DUSB		
8	Master PNote		DUQT		
9	Perkins PNote		PERK		
10	Perkins PNote		PKN+		
11	Promissory Note		PLDL		
12	Promissory Note		PL+		
13	University Loan PNote		UL_1		
14	University Loan PNote		UL_2		
15	University Loan PNote		UL_3		
16	Promissory Note		DGPL		

Loan Report Packages page

The Loan Report Packages page associates pre-defined promissory document types to Direct Loan types. You can print Federal Direct Subsidized and Unsubsidized Stafford and PLUS MPNs on preprinted forms approved by the Department of Education, using the positional print option. When the Office of Management and Budget (OMB) revises approved formats, Oracle delivers updated code to all schools.

Note. Direct PLUS Loan (this includes DL Graduate PLUS loans) master promissory notes print based on positional format with data labels.

Direct Subsidized and Direct Unsubsidized Stafford Loan master promissory notes print based on positional format without data labels.

The system displays the Report Package, Aid Year, and Ln Output Type (loan output type) based on your selection when accessing the page.

Ext Ovr d Parm
(external override parameter)

If you are using an external product, you can enter values in this field using the guidelines set by the external product. This field appends parameters to the JOB line in the external product extract file. Review your external product user's guide.

Leave this field blank if you do not use an external product.

Field Delimiter	This field is not used for promissory note processing.
Input/Output file	<p>If you are using an external product, you must enter a file name to export the report package. This specifies where the output goes when you run the print process.</p> <p>Leave this field blank if do not use an external product.</p>
Rpt Seq (report sequence)	This designates the order in which the system creates the output for each loan document.
Document Type	<p>These are delivered with your system. You must insert a new row for each loan document type to be included in the package:</p> <p><i>Master PNote</i>: Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with <i>Master PNote</i>.</p> <p><i>Promissory Note</i>: PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with <i>Promissory Note</i>.</p>
File Name	<p>If you are using an external product, you must enter the file name of the external product form to associate with the document type. For example, if the document type is Master Pnote, enter MPN0400_E. For document type Perkins Pnote, enter PERKNS_E.</p> <p>Leave this field blank if you do not use an external product.</p>
Loan Type	Enter the loan types associated with the <i>Master PNote</i> or <i>Promissory Note</i> .

Setting Up DL Serial Promissory Note Table

Access the Ln Pnote Type page (Set Up SACR, Product Related, Financial Aid, Loans, Define Serial Promissory Notes, Ln Pnote Type).

Ln Pnote Type

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2008 Financial Aid Year 2007 - 2008

Find View All First 1-5 of 5 Last	
'Loan PNOTE Type: HEALTH PROFESSIONAL	'Communication Speed Key: 03_HL1
'Loan PNOTE Type: MPN	'Communication Speed Key: 03_MPN
'Loan PNOTE Type: PERKINS	'Communication Speed Key: 03_PERK
'Loan PNOTE Type: PNOTE	'Communication Speed Key: 03_DLPL
'Loan PNOTE Type: UNIVERSITY	'Communication Speed Key: 03_UL1

Ln Pnote Type (loan promissory note type) page

Loan PNOTE Type (loan promissory note type) Enter a type for *MPN*, the Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with *MPN*.

Insert a row to add *PNOTE*, the PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with *PNOTE*.

You might also need to add health, Perkins, and university/institutional loans to this setup page.

Communication Speed Key On each row, enter the Communication Key to be associated with the loan PNOTE type.

Setting Up Loan Servicer Table for Direct Lending

Access the Loan Servicer Table page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine4, Define School Servicers, Loan Servicer Table).

Loan Servicer Table						
Servicer ID	OE Cd	Branch	Description	Short Desc	Proc Lead Time	DUNS ID
2	000000	0000	Direct Lending Service Center	DL Svrcr	5 DAYS	123456789
Address Information						
Country: USA United States Address: Edit Address Electronic Address						
Contact Information						
Find View All First 1 of 1 Last Cntact Nbr: 1 Name: <input type="text"/> Title: <input type="text"/> Func Area: <input type="text"/> Contact Address						

Loan Servicer Table page

Servicer ID	This number identifies the servicer associated with the requested loan.
OE Cd (Office of Education code)	When you select a value, the system uses data from the Servicer Load Maintenance database and automatically populates the rest of the information.
Proc Lead Time (process lead time)	Indicates the number of days a loan destination needs to freeze its data to prepare for a transfer to the school. For example, if the lead-time is 5 days, changes can only be made to the student's loan 5 days prior to the first disbursement.
DUNS ID (data universal numbering scheme ID)	The system displays this field if your institution is required to report a DUNS ID in the processing of loans. You can also enter your DUNS ID. The Department of Education assigns the DUNS number to the reporting institution.

Address Information

Enter the address of the loan servicer in the fields in this group box.

Click the Electronic Address link to access the Servicer Electronic Address page, where you can enter an email address for this loan servicer.

Contact Information

Enter the name and title of individual contacts at the loan servicer. You can enter multiple contacts by inserting rows. The Cntact Nbr (contact number) field is used to prioritize the order of your contacts.

Click the Contact Address link to access the Servicer Contact Information page, where you can enter the address and email information for an individual contact at the loan servicer.

Entering Servicer Electronic Addresses

Access the Servicer Electronic Address page (click the Electronic Address link on the Loan Servicer Table page).

Servicer Electronic Address	
Mailbox Type:	Internet
Mailbox ID:	loan_origination@mail.eds.com

Servicer Electronic Address page

Mailbox Type Select the servicer's mailbox type of *None*, *Internet*, or *Compuserve*.

Mailbox ID Enter the servicer's mailbox identification or address to which data files are sent when the files are transmitted using the internet or a private communication network.

Entering Servicer Contact Information

Access the Servicer Contact Information page (click the Contact Address link on the Loan Servicer Table page).

Servicer Contact Information			
Country:	USA	United States	
Address 1:	9876 A Street		
Address 2:			
Address 3:			
City:	Washington		
County:		Postal:	20111
State:	DC	District of Columbia	
Email ID:	you@home.gov		

Servicer Contact Information page

Enter the address and email information in the fields provided.

Setting Up Loan Transfer IDs for Direct Lending

Access the Loan Transfer IDs page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs).

Loan Transfer IDs

Aid Year: 2008 Federal Aid Year 2007 - 2008
Loan Program: Direct Lending

View All First 1-2 of 2 Last

'EC Transaction ID	Description	Short Description	Loan Action Type
DSDFO8OP	DL Schl Acct Stmt Disb '08	DL Schl Ac	

In/Out
Inbound

Batch Yr
A

Batch ID
AS

'FA EDI Source Entity Cd
FATP
Financial Aid Trading Partner

'FA EDI Source Business Unit
FABU

'FA EDI Destination Entity Cd: FATP
Financial Aid Trading Partner

View All First 1-2 of 2 Last

'EC Transaction ID	Description	Short Description	Loan Action Type
DSLFO8OP	DL School Acct Stmt '08	DL School	

In/Out
Inbound

Batch Yr
A

Batch ID
AS

'FA EDI Source Entity Cd
FATP
Financial Aid Trading Partner

'FA EDI Source Business Unit
FABU

'FA EDI Destination Entity Cd: FATP
Financial Aid Trading Partner

Loan Transfer IDs page

Verify that the Loan Transfer IDs are set for the current aid year. Use the Loan Transfer ID Table page to set up loan transfer IDs and descriptions. This is a system definition table used for COD data file processing. EC Transaction ID correlates to Common Origination Message Classes used by Full Participants for sending and receiving data from the COD system for each processing year.

Oracle supports the following message classes for your Direct Lending process:

- DSDFnnOP School Account Statement Disbursements (Fixed Length).
- DSLFnnOP School Account Statement Loan Level (Fixed Length).

EC Transaction ID (electronic commerce transaction ID) Select a value. When you tab to the next field, the system displays the Description and Short Desc (descriptions) for the EC Transaction ID. The EC Transaction ID is based on the Message Classes used for Direct Lending.

Loan Action Type This field does not apply to direct lending.

In/Out The system indicates whether the file is *Inbound* or *Outbound*.

Batch Yr (batch year) Enter the last digit of the appropriate aid year. For example, enter 8 for 2008.

Batch ID Indicates the unique ID for the batch. It is used when transferring data to the loan destination.

FA EDI Source Entity Cd(Financial Aid EDI source entity code) Select the appropriate value for your institution. For most institutions, you select *FATP*.

FA EDI Source Business Unit The system populates this field after an FA EDI Source Entity Cd is selected. The default value should be *FABU*. This allows the EDI Manager to retrieve and generate the appropriate file structure.

FA EDI Destination Entity Cd (Financial Aid EDI destination entity code) You must update your system annually. You should continue to review and update your setup pages for current year processing.

Note. You must update your system annually. You should continue to review and update your setup pages for current year processing.

Valid Loan Transfer IDs

This table lists Direct Lending Loan Transfer ID information current for this publication. Ensure that these transaction IDs are in your system if you plan to use direct lending.

EC Transactions ID	In/Out	File Type Data Definition	Batch Year	Batch ID	FA EDI Entity Source Code and EDI Destination Source Code	FA Entity Source Business Unit
DSDFnnOP	In	Import COD Statement of Account Summary file-Disbursement Level	Last digit of aid year. For example, Batch Year value of 9 represents 2008-2009 aid year.	AS	FATP	FABU
DSLfnOP	In	Import COD Statement of Account Summary file-Loan Level	n	AS	FATP	FABU

Setting Up Loan Types for Direct Lending

You set up loan types, such as a direct lending subsidized type, to group processing information together and then associate certain item types to the loan type. This information is kept in the Loan Type Table, which is accessed from the Loan Type Table component. You can associate certain loan item types with the information you enter in the Loan Type Table.

Three of the four pages in this component are used for Direct Lending. The fourth page, the CommonLine NSLDS Xref page, is not shown here.

Entering the Loan Type

Access the Loan Type Table page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table).

Loan Type Table		CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup	
Aid Year:	2008	Financial Aid Year 2007 - 2008		Academic Institution: PSUNV	
Loan Type:	DSUB	Description:	DIRECT SUBSIDIZED STAFFORD	Short Description: DL_SUB	
Processing		Requirements			
Loan Category:	Subsidized	<input type="checkbox"/> Loan References Required	Nbr Ref Rq: <input type="text"/>	Loan Fee Rate: 3.000 %	
Loan Program:	Direct	<input type="checkbox"/> Credit Check Required		Max Nbr Disbs: 20	
Loan Refund Indicator:	Borrower	<input type="checkbox"/> Loan Cosigner Required	Nbr Csg Rq: <input type="text"/>	Min Loan Amt: 1	
		Cosigner Required Amt: \$0			
Loan Item Types Find First 1 of 1 Last					
SetID: PSUNV	Item Type: 900000000311	Direct Subsidized Stafford			
Loan Fees Customize Find View All First 1-2 of 2 Last					
Loan Fee	Description	Ln Fee Amt	Loan Fee Type	Ln Fee Pct	
DL	DIRECT LOAN SUB AND UNSUB		P	Processing	3.00
DLR	DIRECT LOAN REBATE		R	Rebate	1.50

Loan Type Table page

You can enter a long or short description for the Loan Type.

Processing

Loan Category Select *Subsidized*, *Unsubsidized*, or *PLUS* depending on the type of loan that you are defining. Do not select any option except one of these for direct lending. If you select *PLUS*, a Graduate PLUS Indicator check box appears. Select the check box for Grad PLUS loans.

Loan Program Select the *Direct* option for direct lending.
For example, to set up a Subsidized Stafford loan processed through direct lending, the Loan Category is *Subsidized* and the Loan Program is *Direct*.

Loan Refund Indicator Select one of the following.
Borrower: The borrower of the loan receives any refunds from the loan. For example, the borrower could be a parent or guardian for a PLUS loan.
Student: The student receives any refunds from the loan, whether they are the borrower or not.

You can override the loan refund indicator at the loan application level.

Requirements

Select the appropriate options for the loan by selecting the check boxes. Only those check boxes used for direct lending are explained.

Note. The Loan References Required, Nbr Ref Rq (number of references required), Loan Cosigner Required, Nbr Csg Rq (number of cosigners required), and Cosigner Required Amount fields are used for CommonLine loans only and are not relevant for direct lending.

Credit Check Required	Select if a credit check is required for the type of loan. If selected, direct loan disbursements to the students and transmissions to COD do not occur until the credit check is accepted. Select this check box for PLUS loans.
Loan Fee Rate	Enter the rate to print on the promissory note for this type of loan and transmitted on the loan origination record. Ensure that the loan fee rate matches the loan fee setup for the financial aid item type you associate with this loan type.
Max Nbr Disbs (maximum number of disbursements)	Enter the maximum number of disbursements that are allowed per loan. The recommended values are 20 for Stafford loans and 4 for PLUS loans.
Min Loan Amt (minimum loan amount)	Enter the minimum loan amount that your institution allows. The value should not be less than the COD minimum.

Loan Item Types

SetID	The set ID that you select determines the item types that are available for you to select.
Item Type	The selection available depends on the set ID that you entered. For direct lending you cannot have multiple financial aid item types associated with the same loan type. You must create a separate loan type for each direct lending item type to process. You cannot share financial aid item types across multiple loan types. If you try to use the same item type with a new or another loan type setup, you receive an error message.

The following field values are associated with the item type that you select.

Loan Fee	Displays the type of loan fee associated with the item type selected. When you insert a row, you can use the inner scroll bar to view the new rebate loan fee percentage.
Ln Fee Amt (loan fee amount)	Displays the dollar amount of the loan fee for the item type selected.
Loan Fee Type	Displays the loan fee type associated with the financial aid item type. For direct lending you should have a row for rebate and a row for loan fees.

Ln Fee Pct (loan fee percentage)

Displays the loan fee percentage charged for the item type selected. These values are from your item type setup. The system also displays the interest rebate provided on the item type setup.

Note. DL-COD reporting reports the Direct Loan Interest Rebate Percentage based on the associated Loan Type setup.

As per 9.0 bundle 11, January 2009, changes in federal regulations reduced the interest rebate percentage calculated for Direct Stafford Loan borrowers to 1.0 percent for loans, if the earliest actual disbursement is made on or after July 1, 2009. Prior to bundle 11, the default for the interest rebate percentage reported was 1.5 percent.

Entering Direct Lending Loan Options

Access the Direct Loan Options page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Direct Loan Options)..

Loan Type Table	CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup
Aid Year:	2008	Financial Aid Year 2007 - 2008	Academic Institution: PSUNV
Loan Type:	DSUB	DIRECT SUBSIDIZED STAFFORD	Loan Category: Subsidized
Loan Program:	Direct Lending		
Direct Loan Options			
Days to Add to Inserted Disb: <input type="text"/>		DL Disbursement Option:	Orig <input type="button" value="v"/>
		DL Transmit Disb Option:	Orig Ack <input type="button" value="v"/>

Direct Loan Options page

The system displays the Aid Year, Academic Institution, Loan Type, Loan Program, and Loan Ctgry (loan category).

Direct Loan Options

This group box allows you to specify the conditions for disbursing funds to the students and sending disbursement files to the direct lending Loan Origination Center.

Use Direct Loan Version Displays the direct lending version you are using.

Days to Add to Inserted Disb (disbursement)	<p>This is used for Stafford loans only. When entering an additional disbursement, the system adds the value specified in this field to the current date. This date becomes the anticipated disbursement date on the Origination Change Record for the added disbursement. Use this field to add days to the anticipated disbursement date so the money is actually disbursed later than the anticipated disbursement date.</p> <p>For example, you can take a loan that is being processed today and use this field to add days to the anticipated disbursement date that is placed on the Loan Origination record. This makes the date reported to the COD later than the disbursement date. This field is not commonly used because generally institutions disburse sooner, not later.</p>
DL Disbursement Option	<p>Select when the system allows loans to be disbursed to the student's accounts.</p> <p><i>Orig Ack:</i> Disburses loans after you receive the Origination Acknowledgment.</p> <p><i>Orig:</i> Disburses loans after you originate the loan.</p> <p><i>Orig+PNote:</i> Disburses loans after you receive the origination and promissory note acknowledgments.</p> <p><i>PNote Ack:</i> Disburses loans after you receive the promissory note acknowledgment.</p>
DL Transmit Disb Optn (direct lending transmit disbursement option)	<p>Select when the system should allow transmission of disbursement files to COD.</p> <p><i>Orig Ack:</i> Transmits direct lending disbursements after you receive the origination acknowledgment.</p> <p><i>Orig+PNote:</i> Transmits direct lending disbursements after you receive the origination acknowledgment and COD accepts the promissory note.</p>

Note. If the Credit Check Required check box is selected on the Loan Type Table page, direct loan disbursements to students and transmissions to the COD do not occur until the credit check is accepted. Therefore, the values entered in the DL Disbursement Option and DL Transmit Disb Option fields are subject to the Credit Check Required check box value.

Warning! Changes to either of the DL Disbursement Option or DL Transmit Disb Option parameter settings do not affect loans already originated if the parameter settings are changed after the loans have been originated. Changes to these settings only affect loans originated at the time of the setting. If you have loans originated in error, please contact the Global Support Center.

Selecting DL Disbursement Option Values

Use this table to help determine when you can disburse loans to Student Financials, depending on the field value selected in the DL Disbursement Option field on the Direct Loan Options page.

Process Completed	DL Disbursement Option field on Direct Loan Options page	Authorize and Disburse?	If NO disbursement, what is step before I can disburse the Direct Loan?
Originate Loan	<i>Orig</i>	YES	?
Originate Loan	<i>Orig Ack</i>	NO	Outbound the Originations file then wait for the Origination Acknowledgment file and import the file.
Originate Loan	<i>Orig + PNote</i>	NO	Outbound the Originations file. Promissory notes must be accepted through Promissory Note acknowledgement file from the COD (also printed and manifested if required). The promissory note acknowledgement file must be loaded into the system. Wait for the Origination Acknowledgment file and import the file.
Originate Loan	<i>PNote Ack</i>	NO	Promissory notes must be accepted through Promissory Note acknowledgement file from the COD (also printed and manifested if required). The promissory note acknowledgement file must be loaded into the system.


Selecting DL Transmit Disb Option Values

Use this table to help determine when you can send the disbursement file to the COD, depending on the field value selected in the DL Transmit Disb Option field on the Direct Loan Options page.

<i>DL Transmit Disb Option field on Direct Loan Options page</i>	<i>OK to Process Disbursement Transmission Out?</i>	<i>If NO, what is next step before I can transmit the DL disbursement record?</i>
<i>Orig Ack</i>	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted.	If Loan Origination Acknowledgement has <i>not</i> been imported, wait for the Loan Origination Acknowledgement file, load and import the file. Then run the Direct Loan Out process. Review the processing status of the outbound process on Inquire 1 pages, then run the Outbound EC Agent process to create the outbound disbursement files.
<i>Orig + PNote</i>	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted. Also, Promissory notes must be accepted through Promissory Note acknowledgement file from the COD (also printed and manifested if required). The promissory note acknowledgement file must be loaded into the system.	If Loan Origination Acknowledgement has <i>not</i> been imported, wait for the Loan Origination Acknowledgement file, load and import the file. Then run the Direct Loan Out process. Then run the Direct Loan Out process. Review the processing status of the outbound process on Inquire 1 pages, then run the Outbound EC Agent process to create the outbound disbursement files.

Entering Checklists for the Loan Type

Access the Checklist Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup).

Loan Type Table	CommonLine/NSLDS Xref	Direct Loan Options	Checklist Setup
Aid Year:	2008 Financial Aid Year 2007 - 2008	Academic Institution:	PSUNV
Loan Type:	DSUB DIRECT SUBSIDIZED STAFFORD	Checklist:	03_MPN  03_MPN
Loan Program:	Direct Lending	Loan Category:	Subsidized

Checklist Setup page

Checklist

Select a Checklist item to associate with the loan type. You define the checklist items available. The primary use of attaching a checklist requirement is to prevent disbursement of loan funds until the required documents on the checklist are completed. You can also use it to send reminders and for statistical reporting.

Some examples of possible checklist items are *Direct Loan Promissory Note*, *Direct PLUS Prom Note*, *FFELP Promissory Note*, *FFELP PLUS Promissory Note*, *Perkins Promissory Note*, *Health Professional Note*, and an *Institutional/University Note*.

Viewing System Administration Information

The following tables are view only and can be used by your System Administrator. The fields are defined by field layout and valid values required by the *COD Technical Reference*. This section discusses how to:

- View loan action codes.
- View Direct Lending change fields.

Pages Used to View System Administration Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Action Code	LOAN_ACTNCD_WK00	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table	View loan action codes and messages and their descriptions.
DL Change Fields	DL_CHG_XREF	Set Up SACR, Product Related, Financial Aid, Loans, View Direct Loan Change Fields, DL Change Fields	View loan action codes and descriptions related to Change Origination processing. This is a system definition table used for Direct Lending File processing. The Hold/Suspense options, for students and globally, come from this table.

Viewing Loan Action Codes

Use the Loan Action Code Table page to view loan action codes and messages and their descriptions. This is a system definition table used for file processing.

Access the Loan Action Code Table page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table).

Loan Action Code Table

Aid Year: 2008 Federal Aid Year 2007 - 2008

Find First 1 of 5 Last

Loan Program: D Direct Lending

'Loan Action Type: D Disbursement

Loan Action Codes

Find | View All First 1-3 of 8 Last

Action Cd	Description	Short Description	Loan Action Category
A	Adjusted Disbursement	Adjusted	Status
C	Canceled Disbursement	Canceled	Status
D	Actual Disbursement	Disbursed	Status

Loan Message Codes

Find | View 100 First 1 of 171 Last

Msg Code: 0 **'Category:** Reject **'Description:** Not in use **Short Description:** Not in use

Message Set Number: 14435 **Message Number:**

Loan Action Code Table page

Viewing Direct Lending Change Fields

Access the DL Change Field Cross Reference page (Set Up SACR, Product Related, Financial Aid, Loans, View Direct Loan Change Fields, DL Change Fields).

Aid Year: 2008 Federal Aid Year 2007 - 2008

Find | View All First 1-3 of 84 Last

Direct Loan Chg Field Number		Length:	DL Chg Type:	Status:	DL Fld Type:
P002	Student SSN	9	Demographi	Active	Number
Record:	LOAN_ORIGNATN	Field Name:	SSN		
Direct Loan Chg Field Number		Length:	DL Chg Type:	Status:	DL Fld Type:
P003	Student First Name	9	Demographi	Active	Alphanumeric
Record:	LN_NAME_VW	Field Name:	FIRST_NAME		
Direct Loan Chg Field Number		Length:	DL Chg Type:	Status:	DL Fld Type:
P004	Student Last Name	16	Demographi	Active	Alphanumeric
Record:	LN_NAME_VW	Field Name:	LAST_NAME		

DL Change Fields page

Direct Loan Chg Field Number Displays field numbers defined by *COD Technical Reference*. (direct loan change field number)

Length	Displays the number of characters allowed for the field.
DL Chg Type (direct lending change type)	Displays the type of change this field represents. Values are <i>Demographic</i> , <i>Financial</i> , and <i>Eligibility</i> .
Status	Indicates the status of the field in your system.
DL Fld Type (direct lending field type)	The field type can be <i>Number</i> or <i>Alphanumeric</i> .
Record	The record/table name for this field in the system.
Field Name	Displays the name of the change field.

The change fields are used on two pages:

- Direct Loan Orig Actions (LN_DL_ORIG_INQ) page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions).
- DL Student Change Information (LN_DL_EMPL_PARM) page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change Data).

Chapter 13

Setting Up for Pell Payment Processing

This chapter lists common elements and discusses how to:

- Set up Pell funding method.
- Set up Pell payment information.
- Set up Pell reporting identification data and processing options.
- Set up Pell multi-campus identification.
- Set up severity levels for Pell comment codes.
- Define reconciliation periods.

Common Elements Used in this Chapter

Aid Year	An awarding cycle with defined disbursement periods.
Pell ID Reporting	Identification code assigned to an institution by the Department of Education and used during the exchange of electronic data.
TG Number	A number that corresponds to an institution's Student Aid Internet Gateway (SAIG) mailbox.
OPE ID Number (office of post secondary education identification number)	Identification number assigned by the Department of Education to the reporting institution.
Low T & F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year.

Setting Up Pell Funding Method

This section provides an overview of the Pell funding method and discusses how to define the Pell funding method.

Understanding Pell Funding Method

As part of the Pell payment process setup, institutions must indicate if they are an advanced funding institution or just-in-time funding institution. Under the just-in-time payment method, an accepted disbursement record becomes both a report of a disbursement for a student and a request for funds.

Defining Pell Funding Method

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

Find a complete description of the Financial Aid Defaults page in *Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults, Defining Installation Level Defaults*.

Select the Pell Just In Time Institution check box in the Activation Indicators group box to indicate that you participate in the just-in-time funding method.

Clear the Pell Just in Time Institution check box to indicate that you participate in the advance funding method.

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Installation Level Defaults, page 15](#).

Setting Up Pell Payment Information

To set up Pell payment information, use the Pell payment component (PELL_SETUP_PNL).

This section discusses how to:

- Define Pell payment setup.
- Copy Pell payment options.
- Change Pell payment default information.

Pages Used to Define Pell Payment Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Payment Setup	PELL_PMT_OPTION	Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Payment, Pell Payment Setup	Define Pell payment information to include Pell IDs and other reporting data for Pell payment records to common origination disbursement (COD).

Page Name	Definition Name	Navigation	Usage
Copy Pell Payment Options	PELL_PMT_OPTN_COPY	Click the Copy Pell Payment Option button on the Pell Payment Setup page.	Copy Pell payment options, including academic institution, aid year, and Pell ID reporting setup data from one aid year to another.
Pell Payment Detail	PELL_PMT_SEC	Click the Career - Program Detail button on the Pell Payment Setup page.	Change Pell payment default information. Set up a career and program at the institution when the payment program differs from the default payment schedule or formula.

Defining Pell Payment Setup

Access the Pell Payment Setup page (Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Payment, Pell Payment Setup).

Pell Payment Setup | Pell Institution Address

Aid Year: 2008 Academic Institution: PSUNV

Pell Payment Setup Find | View All First 1 of 1 Last

[Copy Pell Payment Option](#) + -

*Pell ID Reporting: 001315 PeopleSoft University *TG Number: 51234

Software Provider ID: 123456789 Weeks in Program Acad Year:

Institution Type: 4 years OPE ID Number: 08201963

Academic Calendar: Semester Maximum Pell Award: 4050

Payment Methodology: Formula 1 Max EFC: 3851

Financial Control: Public Disbursement Request Offset: -30

Low T & F Flag: SFA Common School ID: 01234567

Hours/Credits in Acad Year: 30 COD Full Participant ☒

Pell Just In Time Institution ☐

[Career - Program Detail](#)

Pell Payment Setup page

Warning! Do not change Pell ID Reporting values in the middle of an aid year. The Pell Grant payment and origination processes reference student awards which are in an Institution context and not directly related to a Pell ID. The Pell ID Reporting for Pell Grant processing is derived from the Institution using the Pell Payment Setup.

Pell ID Reporting	Select to identify an institution. After the Pell ID reporting number is defined for the institution, any school that you associate with your institution, such as an off-site campus, is associated with your primary institution.
TG Number	Enter your TG identification number. This number corresponds to your SAIG mailbox and identifies your school as a destination point.
Software Provider ID	Enter the ID provided by COD. This field is optional.
Institution Type	Select one of the following values: <i>5 years,4 years,Less than 1 yr,Less than 2 yrs, Less than 3 yrs, or Less than 4 yrs.</i>
Academic Calendar	<p>This field is optional. Values are:</p> <p><i>Clock Hour:</i> Measures academic progress by clock hours.</p> <p><i>Crdt Hr NS</i> (credit hour nonstandard term): Uses nonstandard academic terms, and measures progress by credit hours or units. The Financial Aid system does not support this Pell calculation.</p> <p><i>Credit Hr w/o Trm</i> (credit hour without term): Does not use terms, and measures academic progress by credit hours. The Financial Aid system does not support this Pell calculation.</p> <p><i>Quarter:</i> Uses standard term quarters, and measures academic progress by quarter hours.</p> <p><i>Semester:</i> Uses standard term semesters, and measures academic progress by semester hours.</p> <p><i>Trimester:</i>Uses standard term trimesters, and measures academic progress by semester or trimester hours.</p>
Payment Methodology	<p>This field is optional. Values are: <i>Formula 1,Formula 2,Formula 3,Formula 4, Formula 5, and (none).</i></p> <hr/> <p>Note. The Financial Aid system does not support the Pell calculation for academic calendars tracked by clock hour or hours without terms.</p> <p>This includes awarding for Formulas 4 or 5, which are used by institutions with academic calendars tracked by clock hour or hours without terms. The system uses Formula 1.</p> <hr/>

This table describes each payment methodology value:

Payment Methodology	Description
<i>Formula 1</i>	Applies to a standard term, credit-hour program that meets the following conditions: <ul style="list-style-type: none"> • The program uses an academic calendar that includes two semesters or trimesters (fall and spring) or three quarters (fall, winter, and spring). • The fall through spring standard terms provide at least 30 weeks of instructional time. • The program is not offered with overlapping terms. • Full-time enrollment in every term the school offers in the award year is at least 12 credit hours. For example, if your school offers a summer session, that term must define full-time as at least 12 credit hours.
<i>Formula 2</i>	Applies to a standard term, credit-hour program that meets the same conditions as Formula 1 except that the fall through spring standard terms provide less than 30 weeks of instructional time.
<i>Formula 3</i>	Applies to any term-based, credit-hour program. You must use Formula 3 if the program has any nonstandard terms. Use either Formula 1 or 3 if the program has all standard terms and at least 30 weeks of instructional time. Use either Formula 2 or 3 if the program has all standard terms and less than 30 weeks of instructional time.
<i>Formula 4</i>	Applies to a clock-hour program or a credit-hour program without terms.
<i>Formula 5</i>	Applies to nonresidential correspondence programs.




Financial Control	Select to indicate whether the institution is <i>Proprietary</i> , <i>Prvt. Nprft</i> (private and nonprofit), or <i>Public</i> .
Low T&F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category, as mandated by the Department of Education for each award year. Values are: <i>(none)</i> , <i>0</i> , <i>Range 1</i> , and <i>Range 2</i> .
Hours/Credits in Acad Year (hours or credits in academic year)	This field is optional. You can save the page without entering data in this field. Enter the number of hours or credits in the academic year of the program.
Pell Just In Time Institution	Select to indicate the Pell funding method if the institution is participating in the just-in-time program. Use this field for processing disbursement records.
Weeks in Program Acad Year (weeks in program academic year)	This field is optional. You can save the page without entering data in this field. Enter the number of weeks of instructional time in the academic year of the program. For example, if the payment methodology is Formula 1, you would enter <i>30</i> to represent 30 weeks of instructional time.
Maximum Pell Award	Enter the maximum Pell award amount for the academic year. If awards greater than the defined amount exist, the system does not originate those students.

Max EFC (maximum expected family contribution)	Enter the maximum amount of expected family contribution used to calculate a Pell Grant.
Disbursement Request Offset	Enter a value that represents how many days before your school sends out the disbursement. The number that you enter in this field determines how many days before (negative) or after (positive) the disbursement date you send disbursement records. This value is used in the selection for the outbound disbursement process. You can send disbursement records up to 30 days before disbursement for advance funding schools and up to 5 days before disbursement for just-in-time schools.
SFA Common School ID (student financial assistance common school identification)	The system activates this field only if the COD Full Participant check box is selected. The school identifier is common across the Pell, ACG, SMART, and Direct Loan programs. It is a randomly generated eight-digit number assigned by the Department of Education. It serves as the Entity ID required in the School Entity, Reporting School, and Attending School fields of the XML file.
COD Full Participant (common origination disbursement full participant)	Select if the institution is a COD Full Participant to generate, send, and receive a COD XML file. <hr/> Note. If this check box is selected, you cannot generate the EC Agent flat file.
Copy Pell Payment Option	Click to access the Copy Pell Payment Options page, where you can copy setup data from one aid year to another.
Career - Program Detail	Click to access the Pell Payment Detail page. Use this page to set up a career and program at the institution when the payment program differs from the default payment schedule or formula.

Copying Pell Payment Options

Access the Copy Pell Payment Options page (click the Copy Pell Payment Option button on the Pell Payment Setup page).

Copy Pell Payment Options

Copy From :	Copy To:
Academic Institution: PSUNV	Academic Institution: <input type="text"/> 
Aid Year: 2008	Aid Year: <input type="text"/> 
Pell ID Reporting: 001315	Pell ID Reporting: <input type="text"/> 
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Copy Pell Payment Options page

In the Copy To section, select the academic institution, aid year, and Pell ID reporting.

Changing Pell Payment Default Information

Access the Pell Payment Detail page (click the Career - Program Detail button on the Pell Payment Setup page).

PELL PAYMENT DETAIL

Find | View All First 1 1-2 of 2 Last

*Academic Career:	UENG	Weeks in Program Acad Year		Academic Calendar:	
*Primary Academic Program:	UEGQ	Hours/Credits in Acad Year		Payment Methodology:	
*Academic Plan:	ENG-CHEMQ	Low T & F Flag:			
<input type="checkbox"/> Use Fulltime Enrollment		<input type="checkbox"/> Orig Offered		<input checked="" type="checkbox"/> Orig Max Pell	

*Academic Career:	UGRD	Weeks in Program Acad Year		Academic Calendar:	
*Primary Academic Program:	LQU	Hours/Credits in Acad Year		Payment Methodology:	
*Academic Plan:	ENG-QTR	Low T & F Flag:			
<input checked="" type="checkbox"/> Use Fulltime Enrollment		<input type="checkbox"/> Orig Offered		<input type="checkbox"/> Orig Max Pell	

Pell Payment Detail page

- Academic Career

Select a career defined by the institution.
- Primary Academic Program

Select a program defined by the institution.
- Academic Plan

Select a plan defined by the institution.
- Weeks in Program Acad Year (weeks in program academic year)

This field is optional. Enter the number of weeks of instructional time in the academic year of the program.
- Hours/Credits in Acad Year (hours or credits in academic year)

This field is optional. Enter the number of hours or credits in the academic year of the program.
- Academic Calendar

This field is optional. Select from these values: *Clock Hour*, *Crdt Hr NS* (credit hour nonstandard terms), *Quarter*, *Semester*, *Trimester*, and *Hr w/o Terms* (hour without terms).
- Payment Methodology

This field is optional. Select from these available formulas to calculate the student's Pell Grant: *Formula 1*, *Formula 2*, *Formula 3*, *Formula 4*, *Formula 5*, and *(none)*.

Low T & F Flag (low tuition and fees flag)	Identifies annual tuition that falls into the low tuition category as mandated by the Department of Education for each award year. Select from the values: <i>(none)</i> , <i>0</i> , <i>Range 1</i> , and <i>Range 2</i> .
Use Fulltime Enrollment	Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the Orig Max Pell check box.
Orig Offered (originate offered)	If you select this check box, the system does not update the disbursement tables to reflect the actual Pell amount. When you are ready to send in the disbursement request, you must accept the Pell award, rerun origination, and then run the disbursement outbound process. If you do not go back and run origination, the disbursement outbound process does not pick up students whose Pell disbursements are zero. When you select this check box, you can originate a student's award with an award status of <i>Offered</i> .
Orig Max Pell (originate maximum Pell)	Select to direct the system to originate the maximum Pell award amount for all processed students in that career program plan. The maximum Pell award is defined on the Pell Payment Setup page (PELL_PMT_OPTION).

Setting Up Pell Reporting Identification Data and Processing Options

To set up Pell reporting identification data and processing options, use the Pell Payment component (PELL_SETUP_PNL).

This section discusses how to define Pell reporting identification data.

Page Used to Set Up Pell Reporting Identification Data and Processing Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Institution Address	PELL_INST_ADDRESS	Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Payment, Pell Institution Address	Define Pell reporting identification data. Include the Pell reporting ID data, contact information, and processing options.

Defining Pell Reporting Identification Data

Access the Pell Institution Address page (Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Payment, Pell Institution Address).

Pell Payment Setup		Pell Institution Address	
Aid Year:	2008	Academic Institution:	PSUNV
Address Information		Find First 1 of 1 Last	
Pell ID Reporting:	001315		
FAA Name:	Tommy Trojan		
FAA Phone Number:	555/555-5555		
FAA Fax Number:	555/555-5556		
Internet Address:	pell@cod.edu		
Pell Processing Options			
<input type="checkbox"/> Originate Offered Awards		<input checked="" type="checkbox"/> Hold Corrections	
<input type="checkbox"/> Use Fulltime Enrollment		<input type="checkbox"/> Disb Prior to Transmitting Rec	
<input type="checkbox"/> Originate Max Pell Award		<input type="checkbox"/> Payment Period Start Date Req	

Pell Institution Address page

Pell ID Reporting

Displays the identification code assigned to the institution by the Department of Education and used during the exchange of electronic data.

FAA Name (financial aid administrator name), **FAA** (financial aid administrator), **FAA** (financial aid administrator phone number), **FAA** (financial aid administrator fax number), and **Internet Address**

Phone Number (financial aid administrator phone number), **FAA Fax Number** (financial aid administrator fax number), and **Internet Address**

Originate Offered Awards

Select to originate Pell awards with an award status of offered. Otherwise, the system originates only awards in offer or accept status.

Use Fulltime Enrollment

Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the Originate Max Pell Award check box.

Originate Max Pell Award (originate maximum Pell award)

Select to direct the system to originate the maximum Pell award amount for all originated records. The maximum Pell award is defined on the Pell Payment Setup page (PELL_PMT_OPTION).

Hold Corrections

Select to hold corrections. The student record goes on hold when the acknowledgment comes back with corrections. Further processing cannot occur until the status is set back to ready.

Disb Prior to Transmitting Rec
(disburse prior to transmitting record)

Select to verify that Pell Grant funds have been disbursed to the student's account before you transmit a disbursement record. The disbursement process does not pick up a student's disbursement record until the student has been paid through PeopleSoft Enterprise Student Financials.

Payment Period Start Date Req (payment period start date required)

Select to indicate that the institution is ineligible. You cannot process a disbursement request unless the process date is equal to or greater than the reported disbursement date.

Setting Up Pell Multi-Campus Identification

To set up Pell multi-campus identification, use the Pell Attending component (PELL_ATTENDING).

This section discusses how to define Pell multi-campus identification.

Page Used to Define Pell Multi-Campus Identification

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Attending	PELL_ATTENDING	Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell ID Attending, Pell Attending	Define Pell multi-campus identification. Assign a Pell and Common School ID for each of your individual campuses to maintain separate statistics for each campus.

Defining Pell Multi-Campus Identification

Access the Pell Attending page (Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell ID Attending, Pell Attending).

Pell Attending

Aid Year: 2008 **Academic Institution:** PSUNV **Pell ID Reporting:** 001315

Attending Pell Info			
*Attended Pell ID	001315	*Description	PeopleSoft University
Common School ID:	76543210	Campus	MAIN
*Attended Pell ID	001317	*Description	PeopleSoft Community College
Common School ID:	64532107	Campus	WALCR

Pell Attending page

Assign a Pell ID for individual campuses to maintain separate statistics for each campus. Individual campuses or schools must use the Pell ID of the main institution for reporting Pell information.

Attended Pell ID	Select the code assigned to the institution by the Department of Education. This code is the attending ID for which the student is enrolled. Origination records are pulled from each campus for each student.
Description	Enter a site description.
Campus	Select the campus that coincides with the ID and description.
Common School ID	Enter the eight-digit number assigned by the Department of Education. The system uses this identifier in conjunction with the SFA Common School ID. If the reporting school and attending school are the same, this number is identical.

Setting Up Severity Levels for Pell Comment Codes

To set up severity levels for Pell comment codes, use the Pell Comment Code component (PELL_COMM_CD_TABLE).

This section discusses how to:

- Define severity levels for Pell comment codes.
- Copy Pell comment codes.

Pages Used to Define Severity Levels for Pell Comment Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Comment Code Table	PELL_COMM_CD_TABLE	Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Comment Code, Pell Comment Code Table	Define severity levels for Pell comment codes to indicate what action you want to system to take.
Copy Pell Comment Codes	PELL_COMM_CD_COPY	Click the Copy Pell Comment Code button on the Pell Comment Code Table page.	Copy Pell comment codes from one aid year to another.

Defining Severity Levels for Pell Comment Codes

Access the Pell Comment Code Table page (Set Up SACR, Product Related, Financial Aid, Pell Grants, Pell Comment Code, Pell Comment Code Table).

Pell Comment Code Table

Aid Year: 2008Federal Aid Year 2007 - 2008

Copy Pell Comment Code

Customize | Find | 1-215 of 215

*Pell Comment Codes	Description	Severity Level		
001	Invalid Destination Mailbox ID	1	+	-
002	Reporting Entity ID is not eligible to report	1	+	-
003	Duplicate Document ID	1	+	-
004	Entity ID (Source) not found on participant file	1	+	-
005	Full Participant schools cannot submit legacy records	1	+	-
006	Document create date greater than current system date	1	+	-
007	No detail records in document	1	+	-
008	Reported number of students does not equal detail count	0	+	-
010	Phase-in institutions cannot submit Common Record Documents	1	+	-
011	No eligible SSN, DOB, and Last Name combination match on CPS for student	1	+	-
012	No eligible SSN, DOB, and Last Name combination match found on CPS for student	1	+	-
015	Corrected Value same as Original Value	0	+	-
020	First Name and Last Name blank	1	+	-
021	Address is incomplete	1	+	-
023	Incorrect Low Tuition and Fees code/correction applied	0	+	-
024	Reported CPS transaction number does not match CPS	1	+	-
025	Duplicate match on CPS	1	+	-
026	Incorrect Secondary EFC used/correction applied	0	+	-


Pell Comment Code Table page

This page defines the Pell Comment Codes from the Department of Education.

Pell Comment Codes	Lists the identification number assigned to a specific Pell comment.
Description	Describes the Pell comment code.
Severity Level	<p>Select one of the following severity levels to indicate the action that you want the system to take.</p> <p><i>0</i> - Ignore: The system disregards the message.</p> <p><i>1</i> - Action Required: The institution's Pell processor is required to take action to resolve the issue.</p>
Copy Pell Command Code	Click this button to access the Copy Pell Comment Codes page, where you can copy the setup data from one aid year to another.

Copying Pell Comment Codes

Access the Copy Pell Comment Codes page (click the Copy Pell Comment Code button on the Pell Comment Code Table page).

Copy Pell Comment Codes	
Copy From:	Copy To:
Aid Year: 2008	Aid Year: <input type="text"/> 

Copy Pell Comment Codes page

Select an aid year from the values in the Copy To group box.

Defining Reconciliation Periods

To set up reconciliation periods, use the Reconciliation Periods component (PROG_CASH_PER).

This section discusses how to define reconciliation periods.

Page Used to Define Reconciliation Periods

Page Name	Definition Name	Navigation	Usage
Reconciliation Period Setup	PROG_CASH_PER	Set Up SACR, Product Related, Financial Aid, Pell Grants, Reconciliation Periods, Reconciliation Period Setup	Define reconciliation periods for cash management.

Defining Reconciliation Periods

Access the Reconciliation Period Setup page (Set Up SACR, Product Related, Financial Aid, Pell Grants, Reconciliation Periods, Reconciliation Period Setup).

Reconciliation Period Setup

Academic Institution: PSUNV PeopleSoft University

Aid Year 2008 Financial Aid Year 2007 - 2008

Program: Pell Grant

Reconciliation Periods			Find View All	First	1-2 of 2	Last
*Period	Description	Short Description:				
1	Pell - 07/2007	Pell 07/07	<div>+ -</div>			
Period Start Date:	07/01/2007 <div>31</div>	Period End Date:	07/31/2007 <div>31</div>			
*Period	Description	Short Description:				
2	Pell - 08/2007	Pell 08/07	<div>+ -</div>			
Period Start Date:	08/01/2007 <div>31</div>	Period End Date:	08/31/2007 <div>31</div>			

Reconciliation Period Setup page

You can track requests for funds and determine the frequency of reporting by establishing beginning and ending dates for each reconciliation period.

- Period**

Enter the period that the reconciliation covers.
- Description and Short Description**

Enter a description for the period that the reconciliation covers.
- Period Start Date and Period End Date**

Enter the start and end dates (month, day, and year) that the reconciliation period covers. For example, if your institution reconciles on a monthly basis, enter the reconciliation period number for that month and the start and end date for the period. You can insert rows to enter additional reconciliation periods.

Chapter 14

Setting Up the Perkins MPN

This chapter provides an overview of the Perkins MPN setup and discusses how to set up the Perkins MPN.

Understanding the Perkins MPN Setup

The Perkins MPN sSetup provides a high-level processing structure for both Perkins MPN and eMPN. The system prints information entered by the school to the Perkins MPN document. In addition to the following setup pages, you must also use the Awarding Options page (SS_FA_INSTALL2) in self service to set up the Perkins eMPN self-service authentication method and to define additional references.

Setting Up the Perkins MPN

This section discusses how to:

- Define Perkins MPN options.
- Define type of name, address, and telephone number usage.
- Define MPN requirement for financial aid item types.

Pages Used to Set Up the Perkins MPN

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Perkins MPN Setup	SFA_PERK_MPN_SETUP	Set Up SACR, Product Related, Financial Aid, Loans, Setup Perkins MPN Options, Perkins MPN Setup	Define Perkins MPN options and enter school name and address.
FA Process Demographic Use	FA_PRCSDemo_TBL	Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use	Indicate where to retrieve the student demographic information for loan processing. The Perkins MPN process extracts borrowers' demographic information from PeopleSoft Enterprise Campus Community.

Page Name	Definition Name	Navigation	Usage
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.

Defining Perkins MPN Options

Access the Perkins MPN Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Setup Perkins MPN Options, Perkins MPN Setup).

Perkins MPN Setup

Institution: PSUNV PeopleSoft University

MPN Options Find | View All First 1 of 1 Last

*Effective Date: 06/13/2005

*MPN Type: Multi-Year

*MPN Format: Paper

Create Option: Accepted ☐ Create Communication

School Information

School Name: PeopleSoft University

Address 1: 15821 Ventura Blvd.

Address 2: #220

City: Encino

State: CA

Zip Code: 91436

Perkins MPN Setup page

Effective Date

The system provides this value to enable institutions to maintain a history of processes for audit and accounting periods. Because this page is effective-dated, institutions can move from one process to another within an award year. For example, an institution may start off as an annual MPN school and move to a multi-year MPN school within an award year.

MPN Type

Select one of these values:

Multi-Year: Borrowers are required to sign once throughout their academic career.

Annual: Borrowers are required to sign a note once each award year for all loans made for that award year.

MPN Format

Select one of these values:

Paper: Select to provide a paper version of the MPN. This option supports the selection of students in batch for the Print Perkins MPN process.

Electronic: Select to enable a student to electronically sign an MPN over the web using self service.

Note. You can still generate paper MPNs if *Electronic* is selected. Within the self-service Perkins eMPN process, students can leave the Perkins eMPN process and request a paper MPN. In addition, you can use the *Student Override* option on the Print Perkins MPN run control page to print individual student MPNs.

Create Option

Select one of these values:

Accepted: Generate an MPN only if the award status is *Accepted*.

Offered: Generate an MPN if the award status is *Offered*.

Note. If you select *Offered* and the award is accepted with no MPN record created, the system includes those students in the selection. The Offered option is only applicable for the batch Print Perkins MPN process. To proceed, the self-service Perkins eMPN process requires awards to be accepted.

Create Communication

Select this check box to write a communication when the MPN is generated. You can use communication as an additional tracking tool. To generate a communication, you must add a Communication Category called PMPN with a function of LOAN. You should add the PMPN Category to the Communication 3C Group. The Communication Speed Key of LOAN should also have an entry of PMPN.

Note. A communication is not required for the process to run or for the loan to be disbursed.

School Name

Enter the institution's name. This information is required for the MPN.

**Address 1, Address 2,
City, State, and Zip
Code**

Enter the institution's address information. This information is required for the MPN.

Defining Type of Name, Address, and Telephone Number Usage

Access the FA Process Demographic Use page (Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use).

Process Demo Setup						
Process Name	Address Usage	Perm Addr Usage	Mail Addr Usage	Name Usage	Phone Usage	Email Usage
1 Award Notification	SLCT ORD 1			NAME USG 1		
2 ISIR Processing	SLCT ORD 1			NAME USG 1	RPT_PHON	RPT_EMAIL
3 Loan Processing		LOAN_PERM	LOAN_MAIL	NAME USG 1	PSLOAN01	

[Address Usage Table](#)
[Name Usage Table](#)
[Phone Usage Table](#)

FA Process Demographic Use page

Based on the requirements of your institution, define what type of name, address, and telephone number you want printed on the MPN. Because the Perkins MPN process looks at the loan processing usage, coordination across all loan programs is required.

Note. The Email Usage column includes loan processing for CRC processing.

Defining MPN Requirement for Financial Aid Item Types

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID: PSUNV
 Item Type: 900000000323 [Federal Perkins Loan - MPN](#)
 Aid Year: 2006 Financial Aid Year 2005-2006

FA Item Type Setup

*Effective Date: 01/01/1900 *Status: Active Copy
 *Description: Federal Perkins Loan - MPN Short Description: FPLMPN
 Financial Aid Type: Loan Source: Federal Federal ID: Perkins Ln
 Aggregate Area: PERKINS Institution Reporting Cd: MPN Required ☒
 Comments: Federal Perkins Loan

FA Item Type 1 page

MPN Required

Select this check box to indicate that an MPN is required for the financial aid item type awarded to the student. The Perkins MPN electronic signature and print processes use this flag to determine which financial aid item types should be assessed if an MPN is required.

If selected, the financial aid disbursement authorization process requires a valid Perkins MPN before the award can be authorized and disbursed.

Note. You must select *Perkins Ln* as the value in the Federal ID field for the system to display the MPN Required check box.

Note. You should create new item types and corresponding financial aid item types when you enable the new Perkins MPN process. They allow you to track new Perkins MPNs, and they do not negatively affect individuals who currently have a signed and valid Perkins MPN on file.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112

Chapter 15

Setting Up Disbursement Rules

This chapter provides an overview of disbursement rules and discusses how to:

- Define user edit messages.
- Set up disbursement proration rules.
- Define global disbursement rules.
- Define item type disbursement rules.
- Set up authorization and disbursement calendars.

Understanding Disbursement Rules

This section provides a list of prerequisites and an overview of:

- Disbursement rules.
- Disbursement proration rules.
- Global disbursement rules.
- Item type disbursement rules.
- Authorization and disbursement calendars.
- Disbursement ID Table (DISBURSE_ID_TABLE) review.

Prerequisites

Before setting up disbursement rules, you must:

- Set up your institution's financial aid item types and packaging disbursement plans and IDs for the aid year for which you are processing disbursements. These tasks are part of your setup for awarding students.
- Define the FA-BUDGET item grouping in PeopleSoft Enterprise Student Financials.
- Understand how service impacts and checklists affect your financial aid processes.
- Define the specific eligibility criteria necessary to authorize the disbursement of your financial aid funds to students.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Checklists"

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup,"
Setting Up Item Types and Item Type Groups

Disbursement Rules

Authorization and disbursement are the two parts of delivering financial aid funds to students:

- The authorization process applies user-defined global and financial aid item type specific disbursement rules to determine whether awards are eligible for disbursement and determines the amount eligible for disbursement.
- When the awards are successfully authorized, disbursement is the actual delivery of financial aid funds to the student's account in Student Financials.

Warning! To ensure that the Financial Aid Authorization and Disbursement processes function correctly, implement Student Financials first. Implementing Financial Aid without Student Financials requires the creation of modified interfaces to update the Financial Aid loan system with confirmation that student loan funds have been applied to the student's account.

You define authorization process rules by aid year, career, and award (financial aid item type). These rules allow or prevent the disbursement of awards for students in a particular career or for a particular award. A Validation process during awarding or packaging checks on a variety of rules and limits, but student information, particularly registration information, can change before disbursement occurs. The Authorization process checks rules just before the disbursement of awards, either online or in a background authorization process.

Global disbursement rules can apply to all students in a particular career and check that packaging, federal verification, and review of the student's financial aid files are complete. Service impacts and tracking groups can be checked as a global rule. Global rules can hold financial aid if the student has withdrawn, honor any disbursement hold that might exist elsewhere in the system, and withhold disbursement for unsatisfactory academic progress.

Item type disbursement rules for particular awards are associated with a career, so different rules can be defined for each career in which the award is used. Many disbursement rules can be applied to an award, such as:

- Checking a student's academic load and academic level against the load and level used to determine the student's budget or award package.
- Holding if a student is overawarded, has withdrawn, or has other holds in the system.
- Verifying membership in a particular student group, such as an ethnic group, athletic team, geographic location, honor students, or particular field of study.
- Using checklists, tracking groups, or service impacts.

The background disbursement process uses disbursement and authorization calendars to determine when awards can be disbursed to students:

- Authorization calendars indicate the careers and terms that are eligible for authorization and if aid can be authorized more than once for that term, or *reauthorized*. Reauthorization retests the student's eligibility criteria to ensure that the student is still eligible for awards previously authorized and that changes made after the prior authorization have not made the student ineligible for the award.
- Disbursement calendars control which awards, by career, are disbursed for a particular term. You can disburse all awards, all awards except a defined subset, or only a subset of awards. Use the disbursement calendar to control when certain awards are disbursed during the aid year.

The calendars are both effective-dated so you can set up your background disbursement plans for the entire aid year with effective dates for your second, third, and subsequent terms that determine when the awards are disbursed. Alternatively, you can use the same effective date on your calendar for all terms and use run control parameters to control the order in which awards are disbursed. Run control parameters can restrict the background authorization and disbursement processes to only a subset of terms and financial aid item types or can improve processing efficiency by dividing the total population of aid students into several smaller groups that you run sequentially.

Disbursement Proration Rules

If financial aid at your institution is always awarded based on a full time academic load or you have funds for which a full time academic award is assumed, you can set proration rules for specific awards. Use proration rules to base the disbursement for specific awards on a student's enrollment load instead of using the default full time award amount. The term award amount is prorated based on a formula that you set up on the Disbursement Proration Rules page. The proration is calculated for each disbursement for an award and the amounts can vary depending on the term each disbursement is assigned.

Disbursement proration rules are most useful for nonfederal awards and institutional funds for which the award amount should be based on the academic load of the student. You can apply a disbursement proration rule to a financial aid item type when you define the financial aid item type's disbursement rules—on the Disbursement Rules: Item Type - Indicators page.

Note. Disbursement proration rules should *not* be set up for Pell Awards if you select *Enrollment FA Load* or *Enrollment Current Load* in any of the Pell calculation fields Pell Calculation Start, Pell Calculation Midterm, and Pell Calculation Census. The Pell Calculator automatically prorates a student's award based on their FA Load or Current Load, Cost of Attendance (COA), and Expected Family Contribution (EFC) when you select *Enrollment FA Load* or *Enrollment Current Load*. If you select *Full Time* or *Half Time* for all of the Pell calculation fields, you could use a disbursement proration rule, but be aware that the proration rule reduces the award based on the FA Load *only*.

See Also

[Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Installation Level Defaults, page 15](#)

Global Disbursement Rules

The disbursement authorization process uses global disbursement rules that are defined *by career* and apply to all financial aid item types. Use global disbursement rules to set up requirements that all students in the selected career must meet for authorization. Several different elements can be selected in the global disbursement rules, such as service impacts, tracking groups, and academic progress information. For example, you might set up a specific tracking group for students in a certain career. If a student does not meet the items in the tracking group, then the global disbursement rules are not satisfied and the student's aid is not authorized for disbursement.

The disbursement authorization process considers global disbursement rules, defined by career, before it considers item type disbursement rules. In addition, the authorization process verifies whether awards have been accepted and sufficient fiscal funds are available for the disbursement.

Item Type Disbursement Rules

Item type disbursement rules enable you to identify specific criteria that must be met before authorizing individual awards for disbursement. Item type disbursement rules are set up for each career, so if multiple careers use the same item type, you need to define item type disbursement rules for each career. Doing so allows you to select different item type disbursement rules for different careers that use the same item type. Item type disbursement rules take effect during authorization and apply to the designated item type only. Set up item type disbursement rules for all awards (financial aid item types) that have specific rules applied to them.

For example, a Perkins loan might require completion of a particular checklist. You can make the Perkins loan disbursement contingent upon completion of the checklist by adding the checklist as part of the item type disbursement rules. If the Perkins loan fails the authorization step and can not be disbursed, all other awards to the student can be authorized and disbursed.

The disbursement authorization process considers global disbursement rules, defined by career, before item type disbursement rules. In addition, the authorization process verifies whether awards have been accepted and that sufficient fiscal funds are available for the disbursement.

Authorization and Disbursement Calendars

Authorization and disbursement calendars are used by the background authorization and disbursement processes only. If you do not use background authorization and disbursement, you do not need to create these calendars. If you set up these calendars, they are not used if you authorize and disburse awards manually (online). For this reason, ensure that access to your online disbursement pages is carefully determined.

Authorization and disbursement calendars must include each term for which you disburse aid for the aid year. Both calendars use separate effective-dated rows. Using both authorization and disbursement calendars and run control parameters gives you flexibility in implementing your institution's authorization and disbursement. For example, you can set up a single effective-dated row for both the authorization and disbursement calendars where all valid terms and financial aid item types are selected, and then use the batch run control parameters to control the term and financial aid item types that are processed.

Alternatively, you can use multiple future effective-dated rows to introduce the terms and financial aid item types that should be processed over the course of the school year and use the batch run control parameters for exception processing only. For example, if you need a fall and spring disbursement calendar, you might set the fall term's effective date in August and the spring term's effective date in December, one month before the beginning of each term. When background authorization and disbursement is run in September, only awards for fall term would be disbursed because only the authorization and disbursement calendars for fall would have a valid effective date. Both disbursement and authorization calendars, with effective dates, should be set up for each term. Review your business processes carefully to determine the best way to set up your background processes.

Disbursement ID Table Review

The Disbursement ID Table is set up when you define disbursement plans and split codes for awards. A disbursement ID is set up for each disbursement that should be associated with a disbursement plan. Each disbursement ID has a disbursement date associated with it to control the disbursements. The background disbursement process uses the disbursement date to determine whether the awards can be disbursed. The background disbursement process only disburses awards if the cutoff date, on the disbursement calendar, is equal to or later than the disbursement date on the Disbursement ID Table. Set up both the cutoff date on the disbursement calendar and the disbursement date on the Disbursement ID Table to ensure that awards are disbursed at the correct time.

Note. Federal guidelines state that federal financial aid cannot be disbursed to a student more than 10 days prior to the first day of the term, and that federal financial aid should be disbursed separately for each term.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Default Disbursement Plans and Split Codes, page 127

Defining User Edit Messages

To set up user edit messages, use the Create User Edit Messages (USER_EDIT_MSGS) component.

This section provides an overview of user edit messages and discusses how to create user edit messages.

Understanding User Edit Messages

User edit messages can act like service impacts or can designate workflow and disbursement processes for use in special handling of students. You can specify that user edit messages affect your disbursement process by assigning a user edit message to a disbursement rule (either global or financial aid item type). Add user edit messages on the Disbursement Rules: Global page and Disbursement Rules: Item Type page.

Page Used to Define User Edit Messages

Page Name	Definition Name	Navigation	Usage
User Edit Messages	FA_EDIT_MSG_TBL	Set Up SACR, Product Related, Financial Aid, Disbursement, Create User Edit Messages, User Edit Messages	Create or modify user edit messages. These messages are financial-aid-specific indicators that the disbursement processes can use.

Creating User Edit Messages

Access the User Edit Messages page (Set Up SACR, Product Related, Financial Aid, Disbursement, Create User Edit Messages, User Edit Messages).

User Edit Messages

Institution:

PSUNV

PeopleSoft University

Edit Message

Find | View All

First

1 of 1

Last

Edit Message Type:

E

Error

*Edit Message Code:

WD01

+ -

*Description:

Withdraw from term w/aid msg

Short Desc:

Withdraw

Comment:

Student has withdrawn from a term in which s/he has received financial aid. Review students aid package and revise accordingly.

User Edit Messages page

Edit Message Type	Displays the categorized edit message. This field is currently used for statistical purposes only and does not control any processing. Values include <i>Error</i> , <i>Informational</i> , and <i>Warning</i> .
	Note. When you enter a new edit message code, select an edit message type to categorize the error message.
Edit Message Code	Enter a code, up to six characters long, to represent this error message. Enter any code that is meaningful to those who use it. This code appears on the Message Detail page in the authorization and disbursement components if the financial aid item type fails authorization.

Setting Up Disbursement Proration Rules

To set up disbursement proration rules, use the Create Proration Rules (DISB_PRORATION) component.

This section discusses how to define a proration scheme.

Page Used to Set Up Disbursement Proration Rules

Page Name	Definition Name	Navigation	Usage
Disbursement Proration Rules	DISB_PRORATION	Set Up SACR, Product Related, Financial Aid, Disbursement, Create Proration Rules, Disbursement Proration Rules	Define a proration scheme. Then use the Disbursement Rules: Item Type - Indicators page to apply the disbursement proration rule to a specific financial aid item type.

Defining a Proration Scheme

Access the Disbursement Proration Rules page (Set Up SACR, Product Related, Financial Aid, Disbursement, Create Proration Rules, Disbursement Proration Rules).

Disbursement Proration Rules

Institution: PSUNV PeopleSoft University

Disbursement Proration Rule: UNIV GRANT

Descr: University Grant **Short Desc:** University

Distribution Proration List Find | View All First 1 of 1 Last

*FA Load	%	Comments
Full-Time	100	Full time is 100 %

Disbursement Proration Rules page

FA Load

Select an enrollment value to include in the proration rule. Insert rows to add all valid FA Load values for your institution. If a student's enrollment does not match any of the values that you select on this page, the system generates an error message when you run the authorization process. FA Load values are defined in the PeopleSoft Enterprise Student Records Level/Load Rules component. Values are:

Full-Time: The student is enrolled full-time.

Half-Time: The student is enrolled half-time.

Less 1/2: The student is enrolled less than half-time.

No Units: The student is not enrolled in any units for the term.

Three Qtrs: (three-quarters): The student is enrolled for three-quarters of a full-time load.

% (percentage)

Enter the percent of the term's disbursement that the student should receive for this enrollment level.

Note. You should create an award message that tells students why their disbursed amount is less than their awarded amount for awards that use the disbursement proration rule. The award message can be defined for individual financial aid item types.

See Also

Chapter 5, "Setting Up Packaging Basics," Setting Up Award Messages, page 108

Defining Global Disbursement Rules

To set up global disbursement rules, use the Define Global Rules (DISB_RULE_GLB) component.

Global disbursement rules are set up by career and affect all students in the career.

This section discusses how to:

- Define basic global rules for authorization.
- Assign service indicators, tracking groups, and user edit messages.

Pages Used to Define Global Disbursement Rules

Page Name	Definition Name	Navigation	Usage
Disbursement Rules: Global - Indicators	DISB_RULE_GLB	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Global Rules, Indicators	Define basic global rules for authorization. Select specific rules used to hold disbursements of financial aid monies.
Tracking/Messages	DISB_RULE_GLB_2	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Global Rules, Tracking/Messages	Assign service indicators, tracking groups, and user edit messages to a global disbursement rule.

Defining Basic Global Rules for Authorization

Access the Disbursement Rules: Global - Indicators page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Global Rules, Indicators).

Indicators | **Tracking/Messages**

Academic Institution: PSUNV

Academic Career: Undergraduate **Aid Year:** 2005

Indicators Find | View All First 1 of 1 Last

*Eff Date: 06/21/2004 Status: Active

Descr: Undergraduate Short Desc: Undergradu

☒ Review Complete
 ☒ Hold If Withdrawn
 Tolerance Amt: 0

☒ Package Complete
 ☒ Honor Disbursement Hold

☐ Verification Complete
 ☒ Must Meet Satisfactory Prog

☐ Post Disb Reduction Control
 ☐ Hold If No Enrollment Data

☐ Post Disb Red Ctrl - Census Dt
 ☒ Match Fees

Disbursement Rules: Global - Indicators page

Because these global disbursement rules apply to a particular career, you might want to include the career as part of the description and short description.

Select the reasons that you want disbursement to be held. The authorization process verifies each of the items that you select.

Review Complete	Select this check box to require that an institutional review must be completed before disbursement. The Authorization process requires that the value in the Review Status field on the Packaging Status Summary page is <i>Complete</i> .
Package Complete	Select this check box to require that packaging must be completed before disbursement. The Authorization process requires that the value in the Aid Processing Status field on the Packaging Status Summary page is <i>Packaging Completed</i> .
Verification Complete	Select this check box to require that the Department of Education's federal verification must be completed before disbursement. The authorization process requires that the value in the Verification Flag field on the Packaging Status Summary page is <i>Complete</i> or <i>Not Required</i> .
Post Disb Reduction Control (post disbursement reduction control)	<p>Select this check box to activate post disbursement reduction control, which causes award reductions that cause authorization failures for current terms to be managed in the same way as those for previous terms if money had been previously disbursed. For example, assume that a disbursement has been made after which the award is changed for the current term. If this check box is selected, and authorization of the financial aid item type subsequent to the change fails, the lesser of the disbursed amount or the awarded amount is authorized for disbursement for the current term. The lesser of the disbursed amount or awarded amount is authorized for disbursement in previous terms regardless of whether this check box is selected. If you select this check box, the Post Disb Red Ctrl – Census Dt (post disbursement reduction control – census date) check box becomes unavailable.</p> <p>The Disbursement Authorization routine determines current term and prior term using the current date and term end dates. If the current date is before the term end date, that term is the current term. If the current date is after the term end date, that term is a prior term.</p>
Post Disb Red Ctrl – Census Dt (post disbursement reduction control – census date)	Select this check box to use the same rules as the Post Disb Reduction Control check box except that only award changes that occur after the census date for the term are evaluated. The disbursement authorization process uses the same census date as the Financial Aid Term build process. The Census Date Locking page, which you access from the FA Term page, displays the census date used. If you select this check box, the Post Disb Reduction Control check box becomes unavailable.
Hold If Withdrawn	Select this check box to require that disbursement is held when a student has withdrawn from the institution. If a student withdraws, you might want to reduce the student's financial aid award and manually disburse online. The authorization process searches Financial Aid Term records for withdrawal information.
Honor Disbursement Hold	Select this check box to require the authorization process to honor any disbursement hold that has been entered on the Packaging Status Summary page if the financial aid item type matches the disbursement hold type. The types of awards that can be held are <i>Fed Aid</i> (federal aid), <i>Institut.</i> (institutional), and <i>Loan Hold</i> . Funds are not authorized for disbursement if a disbursement hold exists.

Must Meet Satisfactory Prog (must meet satisfactory progress)	Select this check box to require that the value in the Satisfactory Academic Progress field on the Packaging Status Summary page is <i>Meets SAP</i> or <i>Probation</i> .
Hold If No Enrollment Data	Select this check box to require that a student's current FA Term record for the award is built from enrollment data in Student Records—not projection data—for disbursements to be authorized. The rule verifies whether the FA Term build source is <i>Term</i> . For example, if you select this check box and the student has never enrolled in any classes for the term, no funds are disbursed. The same option is available for financial aid item type disbursement rules. Selecting it here enforces the rule for all students and all of their awards in the career for which this global disbursement rule applies. This rule should be used in conjunction with the Hold if Withdrawn and Minimum Units rules to insure that the student is still enrolled for the current term.
Match Fees	Select this check box to require that the tuition-related fees on the student's account match the amount calculated in the student's budget to disburse funds. The fees in the student's account are based on the financial aid item types that belong to the FA-BUDGET item grouping (used by the tuition calculation process). This amount is compared to the financial aid budget fees that belong to the TUIT budget category.
Tolerance Amt (tolerance amount)	This field appears when you select the Match Fees check box. Enter the largest amount by which the fee and budget item amounts can differ. If the difference between a fee and a budget item is smaller than or equal to the amount entered in this field, the disbursement is authorized; otherwise, the disbursement is held.

See Also

Chapter 27, "Preparing for Awarding and Packaging," Reviewing the Packaging Status Summary Page, page 941

Assigning Service Impacts, Tracking Groups, and User Edit Messages

Access the Tracking/Messages page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Global Rules, Tracking/Messages).

Indicators **Tracking/Messages**

Academic Institution: PSUNV
Academic Career: Undergraduate **Aid Year:** 2006

Tracking/Messages Find First 1 of 1 Last
Eff Date: 09/25/2006 **Status:** Active
Descr: Undergraduate **Short Desc:** Undergradu

Service Impact Find First 1 of 1 Last
 AWARD Award Financial Aid

Tracking Find First 1 of 1 Last
 FAAWD

User Edit Messages Find | View All First 1 of 1 Last
 *Type: Error **Msg Code:** WVD01 Withdraw from term w/aid msg

Tracking/Messages page

Service Impact

Select any service impacts to honor global disbursement rules. If a student with this career has an active service indicator with a matching service impact, the authorization process does not authorize the student's awards.

Note. If your institution has upgraded from a previous release of Campus Solutions, review service impacts in the Setting Up Service Indicators chapter in the *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook*.

Tracking

Enter the tracking groups that must be completed before financial aid can be disbursed to a student's account. A tracking group can contain one or more checklists. Insert rows to enter additional tracking groups. You can add checklists to disbursement rules in the Disbursement Rules: Item Type component.

User Edit Messages

Enter messages whose presence on a student's record should hold disbursement. User edit messages are special handling instructions that you define for your students. If a student with this career has one of the user edit messages entered in this group box, the authorization process does not authorize that student's awards.

Type Indicates the type of user edit message that you want to associate with the global disbursement rule. You can only select user edit messages of this type in the Msg Code (message code) field. Insert additional rows to enter additional user edit message types and message codes.

Msg Code (message code)

Enter the message code of the user edit message that causes disbursement to be held. The values are restricted to those with a matching Type value.

Defining Item Type Disbursement Rules

To set up item type disbursement rules, use the Define Item Type Rules (DISB_RULE_ITEM) component.

This section discusses how to:

- Define authorization rules for a financial aid item type.
- Define additional restrictions.
- Assign checklists, tracking groups, service indicators, and user edit messages.

Pages Used to Define Item Type Disbursement Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disbursement Rules: Item Type - Indicators	DISB_RULE_ITM1	Set Up, Product Related, Financial Aid, Disbursement, Define Item Types Rules, Indicators	Define authorization rules for a financial aid item type. Select specific rules used to hold disbursements of financial aid monies.
Copy Disbursement Rule Data	DISB_RULE_COPY	Click the Copy Setup Data link on the Disbursement Rules: Item Type - Indicators page.	Copy disbursement rule setup from one combination of academic institution, aid year, academic career, item type, and effective date to another.
Groups/Thresholds	DISB_RULE_ITM2	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Groups/Thresholds	Define additional restrictions necessary for disbursement of the item type. Place restrictions by minimum units, by grade point average (GPA) required, by a student's attributes, by academic standing, by home residency, or by academic focus.
Checklists/Tracking	DISB_RULE_ITM3	Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Checklists/Tracking	Assign checklists, tracking groups, service indicators, and user edit messages to an item type disbursement rule.

Defining Authorization Rules for a Financial Aid Item Type

Access the Disbursement Rules: Item Type - Indicators page (Set Up, Product Related, Financial Aid, Disbursement, Define Item Types Rules, Indicators).

Indicators Groups/Thresholds Checklists/Tracking

Item Type: 900000000210 ACG1_SEM **Aid Year:** 2008
Academic Career: Undergraduate **Institution:** PSUNV

Indicators Find First 1 of 1 Last

Eff Date: 08/17/2007 **Status:** Active [Copy Setup Data](#)

Descr: ACG1_SEM **Short Desc:** ACG1_SEM

<input type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career	<input type="checkbox"/> Post Disb Red Ctrl - Census Dt
<input type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold	<input type="checkbox"/> Post Disb Reduction Control
<input type="checkbox"/> Verification Complete	<input type="checkbox"/> Must Meet Satisfactory Prog	<input type="checkbox"/> ASG HERA Level Match
<input type="checkbox"/> Official Fed EFC	<input type="checkbox"/> Hold Disb Fed Overaward	<input type="checkbox"/> ASG CIP Code Match
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward	<input type="checkbox"/> ASG Minimum GPA
<input type="checkbox"/> Bdgt/Term Level Match	<input type="checkbox"/> Hold If Withdrawn	<input type="checkbox"/> ASG Incomplete Grades
<input type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees	<input type="checkbox"/> ASG Pell Grant Awarded
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment	

Load Level Rules

☐ Bdgt/Term Load Match **Disbursement Proration Rule:**

☐ Awd/Term Load Match **Use Current Load:**

Disbursement Rules: Item Type - Indicators page

Note. Schools are required to create item type disbursement rules for every ACG and SMART item type. This is required even when schools do not use the delivered ACG and SMART item type disbursement authorization rules.

Copy Setup Data

Click this link to access the Copy Disbursement Rule Data page and copy disbursement rule setup from one combination of academic institution, aid year, academic career, item type, and effective date to another. You can also copy item type disbursement rules using the aid year rollover process.

Indicators

Select the reasons that you want disbursement to be held. The Authorization process verifies each of the items that have been selected.

Official Fed EFC

(official federal expected family contribution)

Select this check box to require that an official EFC must be included in the latest Institutional Student Information Records (ISIR) data prior to disbursement.

NSLDS Loan Year Match (National Student Loan Data System loan year match)	Select this check box to require that the loan year information on the budget term table match the student's NSLDS Loan year on the Financial Aid Term.
Bdgt/Term Level Match (budget/term level match)	Select this check box to require that the student's level on the budget term table must match the student's level on the Financial Aid Term before a disbursement can be made.
Loan Entrance Interview Req (loan entrance interview requirement)	<p>Select this check box to have the authorization process determine whether a student must complete loan entrance counseling for awards of this item type.</p> <p>If your school uses self-service loan counseling, the authorization process reviews the student's loan counseling history on the Loan Counseling page to determine whether the student has satisfied the requirement.</p> <p>See <i>PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook</i>, "Setting Up Financial Aid Self-Service."</p> <p>If your school does not use self-service loan counseling, the authorization process checks the student's NSLDS history for a prior Stafford, Direct, or Supplemental Loan for Student (SLS) loan. If the system finds a record, it authorizes the item type for disbursement. If no prior loan history exists, the student is assumed to be a new borrower, and the Loan Entrance Interview Status field on the Packaging Status Summary component is checked for the student's current status. When an item type fails authorization because of the loan entrance counseling requirement, the following messages can appear: <i>The student is a first time borrower</i> if the current Loan Entrance Interview Status field is blank, or <i>Loan Interview is required to authorize the loan</i> if the current Loan Entrance Interview Status value is <i>Inst Req</i> (Institution Required).</p> <p>To control how this disbursement rule is carried out, use the Loan Entrance Interview Status field on the Packaging Status Summary page. Setting this field to <i>Complete</i> or <i>Pending Resolution</i> allows the disbursement to pass this requirement.</p> <p>You can select this check box only for Direct Loan and FFEL financial aid item types.</p>
Awd Career Match Term Career (award career matches term career)	Select this check box to prevent disbursement if the career used when making the award is not the career that is in Financial Aid Term data.
Hold Disb Fed Overaward (hold disbursement federal overaward)	Select this check box to prevent disbursement of this financial aid item type if a federal overaward exists.
Hold Disb Inst Overaward (hold disbursement institutional overaward)	Select this check box to prevent disbursement of this financial aid item type if an institutional overaward exists.

Authorize to Fee Assessment

Select this check box to require that the disbursed amount for the financial aid item type cannot be greater than the balance on the student's account for the term. If selected, the amount disbursed for the financial aid item type is not greater than the balance on the student's account.

For this feature to work, you must set up the predelivered item grouping named "FA-BUDGET" in Student Financials. Item groupings are set up on the Item Groupings component (Set Up SACR, Product Related, Student Financials, Item Types, Item Type Group). You must assign the appropriate item tree and tree nodes that contain the charge item types that you want the rule to count.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups.

FFELP Tolerance Amt
(Federal Family Educational Loan Program tolerance amount)

Enter the acceptable difference between the authorized amount and the net disbursement amount for the financial aid item type. If the authorized amount is greater than the net disbursed amount, the system calculates the difference. If this difference is greater than the FFELP tolerance amount, the system displays an error during disbursement authorization.

If you leave this field at the default setting (zero), the loan disbursement amount must match the net disbursement amount from the student's package. Generally, you should set this field to a large value (such as 1,000.00 USD) if FFELP loan increases are common. The authorization process never authorizes an amount greater than the amount of any loan check. In addition, disbursements for loans processed electronically using CommonLine are updated to match the approved disbursement amounts from the lender if an electronic guarantee is received and processed by the school.

ASG HERA Level Match(ACG/SMART Higher Education Reconciliation Act Level Match)

Select this check box to compare the HERA level in the grant eligibility record with the beginning of term HERA level in FA Term. Authorization fails if the values do not match.

ASG CIP Code Match
(ACG/SMART Certification of Instructional Program Code Match)

Select this check box to compare the CIP code stored in the grant eligibility record and to the student's derived CIP code from Student Records data, which is from the student's program, plan, or sub-plan and the CIP Code source setting in the ACG/SMART Processing Options page.

Authorization fails if the values do not match. If the student has more than one CIP code due to having multiple active programs, plans, or subplans, one match satisfies the rule.

ASG Minimum GPA
(ACG/SMART minimum grade point average)

Select this check box to verify that the current GPA meets the minimum GPA assigned for the item type ASG Minimum GPA field.

For non 2nd year ACG item types, the GPA from the current FA Term record is used. If the award is defined as a second year ACG grant, then the GPA that is checked is the current GPA for the term where the student completed their HERA level 1.

Note. The rule fails for new transfer students awarded 2nd year ACG and first time financial aid recipients because they would not have any prior FA Term information. Use the disbursement override functionality to disburse the award.

ASG Incomplete Grades
(ACG/SMART incomplete grades)

Select this check box to check for any enrolled course prior to the current term where the grade is still considered in progress (a final grade has not yet been posted). Only courses requiring a grade are checked. If the rule fails, the term that the course is enrolled displays with the error message.

ASG Pell Grant Awarded
(ACG/SMART Pell Grant awarded)

Select this check box to verify that the student has been awarded and has accepted a Pell Grant for the current aid year.

Review Complete, Package Complete, Post Disb Reduction Control
(post disbursement reduction control), **Post Disb Red Ctrl - Census Dt** (post disbursement reduction control – census date), **Hold If Withdrawn, Honor Disbursement Hold, Must Meet Satisfactory Prog** (must meet satisfactory progress), **Hold If No Enrollment Data, Match Fees, Verification Complete, and Tolerance Amt** (tolerance amount)

The descriptions for these fields are the same as for the fields on the Disbursement Rules: Global - Indicators page.

See [Chapter 15, "Setting Up Disbursement Rules," Defining Basic Global Rules for Authorization, page 449.](#)

Load Level Rules

Select whether the three enrollment load-dependent fields in this group box use the default FA Load enrollment load or the student's current load. Both values can be viewed on the student's Financial Aid Term record.

Bdgt/Term Load Match
(budget/term load match)

Select this check box to require that the academic load in the budget term table match the student's Financial Aid Term FA Load enrollment load information. You can also use the current load from the student's Financial Aid Term record.

- Disbursement Proration Rule** Select a disbursement proration rule if awards of this financial aid item type should be prorated based upon the student's Financial Aid Term FA Load value. This rule is used to disburse fractional award amounts to students based on fractional academic loads. For example, a student who is enrolled three-quarters time would receive only 75 percent of the scheduled disbursement amount. These rules are set up on the Disbursement Proration Rules page. You can also use the current load from the student's Financial Aid Term record.
- Stop After Census** Appears only when you select a value in the Disbursement Proration Rule field. Select this check box to prevent the disbursement proration rule from taking effect for this financial aid item type after your institution's census date for the term. The disbursement authorization process uses the same census date as the Financial Aid Term build process. The Census Date Locking page, accessed from the FA Term page, displays the census date used.
- The proration of disbursements typically occurs during the add and drop period before the census date of the term. After that point, depending on your business processes, your institution repackages all prorated awards based on the census date enrollment. After this repackaging has been completed, institutions typically disable the proration rule for the term. This process is repeated each term. This check box enables you to control the proration of financial aid item types per term without having to change the disbursement proration rule settings each term.
- For example, assume that an item type's proration rule indicates that the student should receive 50 percent of the disbursement if enrolled half-time. You select the Stop After Census check box for this item type and the census date is October 15, 2007. If you authorize an award of this item type for a student enrolled half-time on October 14, 2007, the Packaging routine prorates the award. If you authorize the same award on October 16, 2007, the Packaging routine authorizes the entire award, not just the 50 percent that results from proration.
- If you do not repackage all of your prorated awards before the stop after census feature goes into effect, you risk reauthorizing prorated awards for the maximum amount for the term. You might want to stop running batch authorization for these financial aid item types until you have completed repackaging the prorated awards. You can use the new batch authorization page functionality to accomplish this.
- Awd/Term Load Match** (award/term load match) Select this check box to require that the academic load used by the award match the Financial Aid Term FA Load value. You can also use the current load from the student's Financial Aid Term record.
- Use Current Load** The academic load used for awarding can match the Financial Aid Term current load value instead of the Financial Aid Term FA Load value. If you select a value in this field, the Bdgt/Term Load Match, Disbursement Proration, and Awd/Term Load Match rules all use the selected value. Values are:
- (blank)*: Use Financial Aid Term academic load information.
- All Stdnts* (all students): Use Financial Aid Term current load information for all students with this financial aid item type.
- OEE Only*: Use Financial Aid Term current load information for only open entry and open exit students with this financial aid item type.

See Also

Chapter 27, "Preparing for Awarding and Packaging," Reviewing the Packaging Status Summary Page, page 941

Defining Additional Restrictions

Access the Groups/Thresholds page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Groups/Thresholds).

Indicators		Groups/Thresholds		Checklists/Tracking	
Item Type:	900000000431 Federal ACG Grant 2	Aid Year:	2008		
Academic Career:	Undergraduate	Institution:	PSUNV		
Thresholds Find First 1 of 1 Last					
Eff Date:	01/01/1900	Status:	Active	Description:	Federal ACG Grant 2
Ethnic Group:	<input type="text"/>	Res State:	<input type="text"/>		
Acad Stand Hold:	<input type="text"/>	Country:	<input type="text"/>		
Form of Study:	<input type="text"/>	Group:	<input type="text"/>		
Sport:	<input type="text"/>	Acad Plan:	<input type="text"/>		
Athletic Participation Code:	<input type="text"/>	Sub-Plan:	<input type="text"/>		
FFELP Tolerance Amount:	<input type="text" value="\$0"/>	Tolerance Amount:	<input type="text" value="\$0"/>		
Min GPA on FA Term:	<input type="text" value="0.000"/>	ASG Minimum GPA:	<input type="text" value="0.000"/>		
Min GPA Prior FA Term:	<input type="text" value="0.000"/>				
Minimum Units:	<input type="text" value="12.00"/>	Use Current Units:	<input type="text"/>		

Groups/Thresholds page

Ethnic Group

Select a value if the student must be a member of an ethnic group to receive this financial aid item type.

Res State (residence state)	<p>Select the country code in the field. The system then displays the state field. Then select a state of residence to limit disbursement of the item type to a student with a specific state or province of residence, such as Arizona or Nova Scotia.</p> <p>For the Res State field, the system collects the country code along with the state code when establishing this rule. Additionally, the authorization program uses the country code when selecting information from the residency tables. This enables the rule to continue to function for global clients.</p> <p>The disbursement authorization process continues to use official residency information in its evaluation, but uses self-reported residency information if no official information exists. The process also considers effective dates and active term residency information.</p>
Acad Stand Hold (academic standing hold)	<p>Select a value if a student must have a certain academic standing to receive disbursement of the financial aid item type. For example, you could use this to prevent students on academic probation from receiving a merit-based award. Academic standing codes are indicated on the Financial Aid Term pages.</p>
Country	<p>Select a value to limit disbursement to a student from a specific country.</p>
Form of Study	<p>Select a form of study to allow disbursement only to students who are <i>Study Abroad</i>, have <i>Advanced to Candidacy</i> (for a Ph.D. program for example), have a <i>Class Enrollment</i>, or are in a <i>Detached Study</i> program. The authorization process checks the student's form of study on Financial Aid Term.</p>
Group	<p>Select a student group to allow disbursement of the financial aid item type only to students who are a member of a the selected group, such as first generation college students, athletes of all sports, or veterans. You define student groups in Student Records.</p>
Sport	<p>Select a sport if this financial aid item type can be disbursed only to a student participating in a particular sport.</p>
Acad Plan (academic plan)	<p>Select an academic plan to limit disbursement of the financial aid item type to students with a particular academic plan, such as chemistry or art.</p>
Ath Par Cd (athletic participation code)	<p>Select an athletic participation code to further define the type of sport participation required for disbursement. You can choose <i>Active Participant</i>, <i>Manager</i>, <i>Not Recruited</i>, or <i>Recruited</i>. The athletic participation code applies to the selected sport.</p>
Sub-Plan	<p>Select a subplan to limit disbursement of the financial aid item type to students with a particular academic subplan. The authorization process checks academic plan and subplan information from Financial Aid Term. You define academic plans and subplans in Student Records.</p>
Min GPA on FA Term (minimum GPA on Financial Aid Term)	<p>Enter the minimum GPA that a student must have for disbursement of this financial aid item type. The authorization process verifies the cumulative GPA on the current Financial Aid Term.</p>

Min GPA Prior FA Term (minimum GPA on prior Financial Aid Term)	Enter the minimum GPA that a student must have on a prior Financial Aid Term for disbursement of this financial aid item type. Authorization reviews the cumulative GPA on the prior Financial Aid Term within the aid year. For example, if you want the system to check the fall term's minimum GPA before disbursing this financial aid item type for the spring term, you would enter the minimum fall term GPA here. You cannot use this feature if you want to check spring term's GPA for the following fall term's disbursement if the fall term is in a different aid year.
Minimum Units	Enter the minimum number of units for which a student must be registered before this financial aid item type can be disbursed.
Use Current Units	<p>Enter the number of current units, instead of the FA Units from the student's Financial Aid Term record, to determine whether the student meets the minimum units requirement. Values are:</p> <p><i>(blank)</i>: Use FA Units information.</p> <p><i>All Stdnts</i> (all students): Use current unit information for all students with this financial aid item type.</p> <p><i>OEE Only</i>: Use current unit information for only open entry and open exit students with this financial aid item type.</p>
ASG Minimum GPA (ACG/SMART minimum grade point average)	This field displays the GPA used by the ASG Minimum GPA rule. You can update only when the ASG Minimum GPA option is selected.

Assigning Checklists, Tracking Groups, Service Indicators, and User Edit Messages

Access the Checklists/Tracking page (Set Up SACR, Product Related, Financial Aid, Disbursement, Define Item Type Rules, Checklists/Tracking).

Indicators		Groups/Thresholds		Checklists/Tracking	
Item Type:	900000000376 Perkins - ELO - Quarter			Aid Year:	2006
Academic Career:	Undergraduate			Institution:	PSUNV
Tracking/Messages Find First 1 of 1 Last					
Eff Date:	01/01/1900	Status:	Active	Descr:	Perkins - ELO - Quarter
Checklists Find First 1 of 1 Last			Tracking Find First 1 of 1 Last		
06_PRK 2006_PERKINS PNOTE			FAAWD Financial Aid Awarding		
Service Impact Find First 1 of 1 Last					
AWARD Award Financial Aid					
User Edit Messages Find View All First 1 of 1 Last					
Type:	Error	Msg Code:	WD01	Withdraw from term w/aid msg	

Checklists/Tracking page

Checklists

Enter the checklists that must be completed before awards of this financial aid item type are authorized. If a checklist has been assigned to a student and it is not complete, the item type is not disbursed. Checklists can include multiple items that need to be completed or verified. To enter additional checklists, add a new row.

Tracking

Enter the tracking groups that must be completed before awards of this financial aid item type are authorized. To enter additional tracking groups add a new row.

Service Impact

Select any service impacts that you want the financial aid item type disbursement rule to honor. If a student with an award of this financial aid item type has any service indicators with a matching service impact, the authorization process does not authorize that award.

User Edit Messages

User edit messages are special handling instructions that you define for your students. Enter messages whose presence on a student's record should hold disbursement. If a student with this career has one of the user edit messages entered in this group box, the authorization process does not authorize that student's awards.

Type	Indicates the type of user edit message that you want to associate with the global disbursement rule. You can only select user edit messages of this type in the Msg Code (message code) field. Insert additional rows to enter additional user edit message types and message codes.
Msg Code (message code)	Enter the message code of the user edit message that causes disbursement to be held.

Setting Up Authorization and Disbursement Calendars

To set up authorization and disbursement calendars, use the Set Up Disbursement Calendars component (AUTH_CALENDER).

This section discusses how to:

- Define the authorization calendar.
- Define the disbursement calendar.

Pages Used to Set Up Authorization and Disbursement Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Authorization Calendar	AUTH_CALENDER	Set Up SACR, Product Related, Financial Aid, Disbursement, Set Up Disbursement Calendars, Authorization Calendar	Define the authorization calendar by selecting which careers, and which terms for each career, can be authorized for disbursement in batch.
Disbursement Calendar	DISB_CALENDER	Set Up SACR, Product Related, Financial Aid, Disbursement, Set Up Disbursement Calendars, Disbursement Calendar	Define the disbursement calendar by selecting which awards should be disbursed and the disbursement date cutoff.

Defining the Authorization Calendar

Access the Authorization Calendar page (Set Up SACR, Product Related, Financial Aid, Disbursement, Set Up Disbursement Calendars, Authorization Calendar).

Authorization Calendar		Disbursement Calendar	
Institution:	PSUNV PeopleSoft University	Aid Year:	2008 Financial Aid Year 2007 - 2008
Auth Calendar Effective Date		Find First 1 of 1 Last	
*Eff Date:	01/01/1900	Status:	Active
Career/Term Auth Calendar		Find View All First 1-3 of 4 Last	
*Career:	GRAD Graduate	*Term:	0590 2007 Fall
<input checked="" type="checkbox"/> Reauthorize All Aid			
*Career:	GRAD Graduate	*Term:	0600 2008 Spring
<input checked="" type="checkbox"/> Reauthorize All Aid			
*Career:	UGRD Undergrad	*Term:	0590 2007 Fall
<input checked="" type="checkbox"/> Reauthorize All Aid			

Authorization Calendar page

- Career** Select a career that you want to be included in background authorization. Insert rows to list additional careers or combinations of career and term.
- Term** Select a term to include in background authorization for the selected career. This field works in conjunction with the Disbursement Date field on the Disbursement ID Table page to determine the disbursement IDs that are displayed on the Disbursement Calendar page.
- Reauthorize All Aid** Select to indicate that the system can run a student's aid authorization against the disbursement rules multiple times to ensure that the system is using the most current information to disburse awards. Currently, disbursement authorization processes an award as long as the award has not been disbursed. The authorization process determines that the award has been disbursed when the disbursement net amount equals the amount previously authorized. If an award has been previously authorized, it is not reauthorized unless the award amount is changed or this check box is selected. Your institution might want to run the authorization process with this option active until it is time to disburse awards to the student's account.

Note. Awards that have been completely disbursed are never reauthorized.

Defining the Disbursement Calendar

Access the Disbursement Calendar page (Set Up SACR, Product Related, Financial Aid, Disbursement, Set Up Disbursement Calendars, Disbursement Calendar).

Disbursement Calendar

Institution: PSUNV PeopleSoft University **Aid Year:** 2008 Financial Aid Year 2007 - 2008

Disbursement Calendar Effective Date Find 1 of 1 Last

*Eff Date: 01/01/1900 Status: Active Assign To:
 SetID: PSUNV *Origin: 0000 *Group Type: Financial Aid

Career/Term/Item Type Disb Calendar Find First 1 of 4 Last

*Career: GRAD Graduate *Term: 0600 2008 Spring Cutoff Date: 05/07/2008

Subset

☒ All Types ☐ Except Items

Selected Plans/Id's Find View All First 1-2 of 29 Last

Disb Plan: 01 2 Semesters	Disb ID: 02 Spring Semester	Disb Date: 01/14/2008
Disb Plan: 02 3 Semesters	Disb ID: 03 Spring	Disb Date: 01/14/2008

Disbursement Calendar page

Depending on your needs, you can set up various disbursement calendars with different effective dates and different subsets of awards to be disbursed. You can set up a disbursement calendar for each term for which you want to disburse aid in the aid year. You can set up disbursement calendars with future effective dates for your second, third, and subsequent terms. Conversely, you can also define all of your terms in the same calendar with the same effective date, but control the terms and financial aid item types to be processed using the batch run control parameters.

Disbursement Calendar Effective Date

Assign To

Select the ID of the administrator that the background disbursement process assigns to all group post transactions created in Student Financials. The record and field PS_GROUP_CONT_INFO.ASSN_OPRID is updated in Student Financials. All financial aid funds processed in batch are assigned this ID. You can view this assigned ID in the various Group Post-related components.

SetID

Select a set ID for this disbursement calendar. The set ID, in this case, indicates which accounts in the Student Financials system to credit when disbursements occur.

Origin

Student Financials considers financial aid monies a *receivable*. Select the source of receivables; for financial aid monies, you usually specify the financial aid office as the origin. Identifying each background disbursement group by origin and type of group helps to manage the flow of receivables. You set up origins in Student Financials.

Group Type Group types classify disbursements for Student Financials so that the system knows what type of receivable the disbursement should be. For example, you might use *Financial Aid Disbursements* as the group type. The values in this field depend on the group types that you define in Student Financials.

Career/Term/Item Type Disb Calendar

Career Select a career that you want to be included in background disbursement. Insert rows to list additional careers or combinations of career and term. You can enter as many combinations of career and term as you need to define your disbursement calendar. The background disbursement process only disburses for the careers and terms that you designate here.

Term Select a term to include in background disbursement for the selected career.

Cutoff Date Enter a cutoff date for the associated career and term. When the batch disbursement process runs, it selects only financial aid item types for the associated career and term that have a disbursement date that is equal to or before the defined cutoff date. You set up disbursement dates on the Disbursement ID page when you assign disbursement IDs to packaging plans.

All Types For each combination of career and term, you can control which item types are included during the background disbursement process. Select this check box to include all financial aid item types in the background disbursement process. This check box is selected by default.

Subset

Except Items If you select the All Types check box, this field becomes available. Select to exclude some financial aid item types from the background disbursement process. Use the From and To fields to enter a range of financial aid item type IDs to exclude.

Only Include Items If you clear the All Types check box, this field becomes available. Select to indicate a range of financial aid item types that should be included in the background disbursement process.

From and To Enter the first and last financial aid item types to be included or excluded from the background disbursement process. These financial aid item types and any financial aid item types within that numbering sequence are included or excluded from the background disbursement.

Selected Plan/IDs

Displays disbursement plans and their associated disbursements that meet the disbursement calendar settings you enter in the previous group boxes.

- Disb Plan** (disbursement plan) Displays disbursement plans for the career/term combination used as part of the background disbursement process. The cutoff date determines which disbursement plans and disbursement IDs are displayed. Only awards that have the same disbursement plans as those listed in this group box are disbursed when background disbursement is run.
- Disb ID** (disbursement ID) Displays disbursement IDs for the selected disbursement plan that fall within the selected term. The cutoff date determines which disbursement IDs are displayed in this group box. Only the portion of an award that matches the displayed disbursement IDs is disbursed when background disbursement is run.
- Disb Date** (disbursement date) Displays disbursement dates associated with each disbursement ID.

Note. The disbursement ID for a combination of disbursement plan and disbursement ID must be earlier or equal to the cutoff date for the disbursement plan and disbursement ID combination to be listed in the Selected Plan/IDs group box. The following table illustrates the selection process.

Examples

<i>Example Cutoff Date</i>	<i>Example Disbursement Dates</i>	<i>Disbursement Plan Selected</i>
June 6, 2004	January 8, 2004 May 30, 2004 June 1, 2004	All disbursement plans and disbursement IDs with the example disbursement dates are selected, because the disbursement dates are earlier or equal to the cutoff date.
January 7, 2004	January 8, 2004 May 30, 2004 June 1, 2004	None of the disbursement plans and disbursement IDs with the example disbursement dates are selected. The disbursement dates are after the cutoff date.
January 8, 2004	January 8, 2004 May 30, 2004 June 1, 2004	Only disbursement plans and disbursement IDs with the disbursement date of January 8, 2004 are selected because the disbursement date is equal to the cutoff date. All others are not selected because they are after the cutoff date.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Introducing Business Units and Data Sharing," Tableset Sharing

Chapter 16

(UK) Setting Up Student Loans Company

The Campus Solutions Student Loans Company (SLC) feature assists Higher Education Institutions (HEIs) in the United Kingdom (UK) in administering their responsibilities regarding SLC student assistance programs.

This chapter provides an overview of SLC and discusses how to set up SLC processing.

Understanding SLC

The SLC administers government-funded loans and grants to students by working with approximately 200 local education (award) authorities, including:

- Local Authorities in England and Wales (LEAs)
- Student Awards Agency for Scotland
- Education and Library boards in Northern Ireland
- HM Revenue & Customs
- 700+ HEIs

HEI students apply for student support annually. Depending on where they live, they apply through their LEAs or directly to the SLC. Application files are available to the HEI in August just before the beginning of each academic year.

The SLC also administers maintenance payments to students and, optionally, bursaries and scholarships on behalf of the HEIs.

Prerequisites

Before setting up SLC, you must set up your academic institution and aid year.

You must also understand how checklists, communication, financial aid packaging, and disbursement work.

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Aid Years, page 9.](#)

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Institutions.

Setting Up SLC Processing

This section discusses how to:

- Define SLC options.
- Define search match options.

Pages Used to Set Up SLC Processing

Page Name	Definition Name	Navigation	Usage
Student Loans Company-Options	SFA_SLC_SETUP	Financial Aid, Student Loans Company, Student Loans Company Setup, Options	Define SLC options.
Search Match Options	SFA_SLC_SRCH_MATCH	Financial Aid, Student Loans Company, Student Loans Company Setup, Search Match Options	Define search match options.

Defining SLC Options

Access the Student Loans Company - Options page (Financial Aid, Student Loans Company, Student Loans Company Setup, Options).

Options		Search Match Options	
Academic Institution PSUNV		Aid Year Financial Aid Year 2007 - 2008	
HEI Code CAMB			
General			
*SLC Acad Year 2008			
SSAR Import			
Bank Details Comm Key <input type="text"/>		<input checked="" type="checkbox"/> Make Ready for Packaging	
Create SSAR Checklist <input type="text"/>			
SSAC Extract			
Use Checklist <input type="text"/>		<input checked="" type="checkbox"/> Use Physical Attendance Flag	
		<input type="checkbox"/> Complete SSAR Checklist	

Student Loans Company - Options page (1 of 2)

ACR Processing

Attendance Equation

ADDSLMSG04

Course Fee Equation

ADDSLMSG19

Course Code Equation

ADDSLMSG06

Tuition Liability Equation

ADDSLMSG20

Course Year Equation

ADDSLMSG10

At Fee Equation

ADDSLMSG20

Course Fee Group

TUITION

TFRA Parameters

Tuition Fee Loan Group

FINAID

Tuition Fee Grant Group

GRANTS

HEBSS Import

☐ Make Ready for Packaging

Student Loans Company - Options page (2 of 2)

General

SLC Acad Year (Student Loans Company academic year) Select the year for which this setup is intended.

SSAR Import

- Bank Details Comm Key**
(bank details communication key)

Select the communication key to be used when the Bank Details Held fields in the Student Support Attendance Requests (SSAR) files being imported have a value of *N*.

The communication is created only if the communication designated by the communication key does not already exist for the student.
- Create SSAR Checklist**
(create Student Support Attendance Requests checklist)

Select the checklist to be assigned to students when their SSAR record is imported.

This checklist can be used for controlling disbursement of Tuition Fee Grant (TFG) and Tuition Fee Loan (TFL) award disbursements. Disbursement rules can consider a checklist status. The checklist is created only if the designated checklist code does not already exist for the student.
- Make Ready for Packaging**

Select this check box to update the Packaging status to *Ready for Packaging*.
The Packaging status is updated for a student when either of the following is true:
 - Initial SSAR data is received for the student for this SLC academic year.
 - A subsequent SSAR file is received for the student for this SLC academic year with a TFL or TFG amount that is different from the amount stored for the student and the student's Packaging status is *Packaging Completed*.

SSAC Extract

Use Checklist	Select the checklist to be used when selecting the students to be included in the Generate SSAC Data process. When evaluating whether the student can be included in the SSAC Extract, the process determines whether the student has this checklist assigned and whether the checklist is complete.
Use Physical Attendance Flag	Select this check box to ensure that the Generate SSAC Data process checks to see if the student's physical attendance is confirmed when evaluating whether the student can be included in the SSAC Extract.
Complete SSAR Checklist (complete Student Support Attendance Requests checklist)	Select this check box to ensure that the Generate SSAC Data process updates the status of the checklist designated in the Create SSAR Checklist field to <i>Complete</i> .

ACR Processing

Use this group box to:

- Associate equations with each of the Attendance Confirmation Report (ACR) elements that is used to determine the At Fee Code that is sent in the ACR Response File from the HEI to the SLC.
- Designate a course fee group to be used in the Course Fee element.
- Designate an equation to determine the At Fee Code to be returned for each student with the ACR Response File.

At Fee Codes are defined by the SLC.

When writing equations to be used by the At Fee Evaluation process, ensure that they return values for the same calendar date. These values can be compared with students' ACR data to determine the At Fee Code. The exception is the attendance status, which is determined for the same calendar date as the other equations, but which has no ACR field to use for comparison.

The values that are available in the equation fields in this group box appear by default from the Equation Editor (EQUATION_EDITOR) component (Set Up SACR, Common Definitions, Equation Engine, Equation Editor, Equation Editor).

Note. No equations are delivered for ACR processing as of the release of the Summer 2008 Bundle.

If you write equations to be selected in the Attendance Equation, Course Code Equation, Course Year Equation, Course Fee Equation, and Tuition Liability Equation fields:

- The Attendance Equation must set the value for the SFA_SLC_EQ_ATTSTAT field.
The translate values for SFA_SLC_EQ_ATTSTAT are *A - In Attendance*, *N - Not in Attendance*, and *S - Studies Suspended*.
- The Course Code Equation must return the UCAS or SLC Code for the course (depending on which type of course code was provided on the ACR).

- The Course Year Equation must return the year of the course of study/program in which the student is enrolled; for example, a value such as 1, 2, 3, or 4.
- The Course Fee Equation must return the amount of tuition fees charged to the student for this academic year.
- The Tuition Liability Equation should set the following equation engine variables:
 - SFA_SLC_EQ_TUITLN - Tuition Loan Amt
 - SFA_SLC_EQ_TUITGNT - Tuition Grant Amt
 - SFA_SLC_EQ_TUITSTD - Tuition Student Liable Amt

Course Fee Group Select the fee group to be used by the Course Fee equation. Values appear by default from the Student Financials Item Type Groups (ITEM_GROUPINGS) component (Set Up SACR, Product Related, Student Financials, Item Types, Item Type Groups).

All fields in the ACR Processing group box are optional.

However, to use the ACR At Fee Evaluation process, you must write an equation to be selected in the At Fee Equation field.

The At Fee Equation should be coded to populate the Equation Engine variable SFA_SLC_ATTEND_IND.

You can write the At Fee equation so that it uses the results of one or more of the other equations in the ACR Processing group box, or you can write an At Fee equation that does not rely on other equation results.

See [Chapter 42, "\(UK\) Using Student Loans Company," Running the ACR At Fee Evaluation Process, page 1662.](#)

TFRA Parameters

Use this group box to define which financial aid item type group represents Tuition Fee Grants and which financial aid item type group represents Tuition Fee Loans. This mapping enables you to create or modify a reconciliation query using imported Tuition Fee Remittance Advice (TFRA) data. The values for these two fields appear by default from the Financial Aid Related Item Type Group (PKG_REL_ITEM_GROUP) component (Set Up SACR, Product Related, Financial Aid, Awards, Related Item Type Group).

Tuition Fee Loan Group Select a financial aid item type group for this tuition fee loan item type.

Tuition Fee Grant Group Select a financial aid item type group for this tuition fee grant item type.

HEBSS Import

Make Ready for Packaging

- Select this check box to update the packaging status to *Ready for Packaging*.
- The Packaging status is updated for a student when either of the following is true:
- Initial Higher Education Bursaries and Scholarships Scheme (HEBSS) data is received for the student for this SLC academic year.
 - A subsequent HEBSS file is received for the student for this SLC academic year and the student's Packaging status is *Packaging Completed*.

Defining Search Match Options

Access the Search Match Options page (Financial Aid, Student Loans Company, Student Loans Company Setup, Search Match Options).

Options

Search Match Options

Academic Institution

PSUNV

Aid Year

Financial Aid Year 2008 - 2009

HEI Code

CAMB

Search Parameter

PSCS_SLC_UK

SLC UK Search Parameters

No Match Found

Update

Suspend

Ignore

New

Match(es) Found

Find

First

1 of 3

Last

One Match:

☒

☐

☐

Order Nbr

10

Name,Bday,Gender

One Match:

☒

☐

☐

Order Nbr

20

Name,Gender

One Match:

☒

☐

☐

Order Nbr

30

Name Only

Search Match Options page

Use this page to select the search parameters that you want to use for the Import SSAR Files process, the Import HEBSS Files process, and the Import ACR/TFPR Files (Import Attendance Confirmation Report and Tuition Fee Position Report Files process), and the subsequent actions to be taken for the different match scenarios.

Note. Students for whom an exact Student Support Number match exists have their records directly added to the Student SLC table and are not be subject to the Search/Match options defined on this page.

Chapter 17

Setting Up Return of Title IV Funds

This chapter provides an overview of the return of Title IV funds, lists common elements, and discusses how to:

- Define Title IV funds item types.
- Define institutional charges.

Understanding Return of Title IV Funds

Under the higher education amendment regulation called Return of Title IV Funds (RTIVF), all students receiving Title IV federal grant or loan assistance who withdraw from the institution in the first 60 percent of the term are subject to the RTIVF policy. This regulation affects the calculation of aid to be returned as well as repayment procedures. The percentage of aid earned by a Title IV student is determined by calculating the percentage of the period that the student completed. If the student completes up to 60 percent of the term, then the percentage of aid earned equals the percentage of the completed period. If the student completes 60.01 percent or more, then the student earns 100 percent of aid. The amount of Federal Title IV aid that students must return when they withdraw from school is no longer associated with the refund policy of an institution. Refund policy and return of funds procedures are independent of one another. Refund policy is defined by your institution, whereas Return of Title IV Fund is defined by law.

Common Elements Used in This Chapter

Academic Institution	A university or college.
Aid Year	An awarding cycle with defined disbursement periods.

Defining Title IV Funds Item Types

To set up Title IV funds item types, use the Define Rules for Return component (RTRN_TIV_FND_SETUP).

This section discusses how to define the financial aid item types used for RTIVF calculations.

Page Used to Define Item Types for RTIVF

Page Name	Definition Name	Navigation	Usage
Title IV Funds	RTRN_TIV_FND_SETUP	Financial Aid, Return of Title IV Funds HERA, Define Rules for Return, Title IV Funds	Define Title IV funds financial aid item types for return of funds calculation.

Defining Title IV Funds Financial Aid Item Types

Access the Title IV Funds page (Financial Aid, Return of Title IV Funds HERA, Define Rules for Return, Title IV Funds).

Title IV Funds		Institutional Charges	
Academic Institution: PSUNV PeopleSoft University		Aid Year: 2009	
Auto Populate			
Selected Funds/Item Types			
*Item Type		50 Pct. Grant Protection	Fed Funds Pct.
1 900000000100	Federal Pell Grant	<input checked="" type="checkbox"/>	100
2 900000000101	Federal Pell Grant - Std Perm	<input checked="" type="checkbox"/>	100
3 900000000102	Federal ACG Grant yr 1 (RTIV)	<input checked="" type="checkbox"/>	100
4 900000000103	Federal ACG Grant yr 2 (RTIV)	<input checked="" type="checkbox"/>	100
5 900000000104	Federal SMART Grant (RTIV)	<input checked="" type="checkbox"/>	100
6 900000000105	Federal SEOG Grant	<input checked="" type="checkbox"/>	100
7 900000000106	Federal SEOG - Std Perm	<input checked="" type="checkbox"/>	100
8 900000000107	Federal TEACH Grant (RTIV)	<input checked="" type="checkbox"/>	100
9 900000000210	ACG1_SEM	<input checked="" type="checkbox"/>	100
10 900000000211	ACG2_SEM	<input checked="" type="checkbox"/>	100
11 900000000212	SMART1_SEM	<input checked="" type="checkbox"/>	100
12 900000000213	SMART2_SEM	<input checked="" type="checkbox"/>	100
13 900000000214	ACG1_QTR	<input checked="" type="checkbox"/>	100
14 900000000215	ACG2_QTR	<input checked="" type="checkbox"/>	100
15 900000000216	SMART1_QTR	<input checked="" type="checkbox"/>	100
16 900000000217	SMART2_QTR	<input checked="" type="checkbox"/>	100
17 900000000300	Sub Staff - Std Perm	<input type="checkbox"/>	100
18 900000000303	PLUS Loan	<input type="checkbox"/>	100
19 900000000304	Sub Staff - Sem	<input type="checkbox"/>	100

Title IV Funds page

Item type

Select the item types that your institution has assigned to the funds awarded as financial aid. The system uses the item type to associate the financial aid transaction with the appropriate general ledger account during the general ledger process. The way in which item types are classified determines how they are processed. Only financial aid item types with a source of *Federal* can be selected.

50 Pct. Grant Protection
(50 percent grant protection)

The system selects this check box based on the Item Type and Fund Type selected. Funds that are federal grants or are fully funded by federal funds are under the 50 percent rule. This rule reduces the grant amount to be returned by the student by applying an initial 50 percent reduction in the total grant amount to be repaid.

Fed Funds Pct (federal funds percent)

You can edit this field. The default is 100 percent. Enter the percentage of the fund type funded by federal funds. For example, you might enter *50* for a fund such as SEOG that might be matched 50 percent by state funds and 50 percent by federal funds.

Fund Type

Select the type of Title IV program. Pell Grants, PLUS loans, SEOGs, and subsidized and unsubsidized federal Stafford loans are examples of Title IV funds.

Auto Populate

Click to identify that the aid is defined as part of the Title IV program. The system selects financial aid item types with a source of *Federal*, such as Pell Grant, SEOG, Direct Loan, and PLUS loan and populates the fields on this page.

Defining Institutional Charges

To set up institutional charges, use the Define Rules for Return component (RTRN_TIV_FND_SETUP).

This section discusses how to set up institutional charges.

Page Used to Define Institutional Charges

Page Name	Definition Name	Navigation	Usage
Institutional Charges	RTRN_TIV_CHG_SETUP	Financial Aid, Return of Title IV Funds HERA, Define Rules for Return, Institutional Charges	Set up institutional charges and the appropriate charge category.

Setting Up Institutional Charges

Access the Institutional Charges page (Financial Aid, Return of Title IV Funds HERA, Define Rules for Return, Institutional Charges).

Title IV Funds

Institutional Charges

Academic Institution:

PSUNV

PeopleSoft University

Aid Year:

2009

☐

Use Actual Charges

Customize

Find

First

1-2 of 2

Last

*Item Type Group		*ChargeType		
1 HOUSNGONLY	Housing Only	Room/Board	+	-
2 TUIT&FEES	Tuition and Course Class Fees	Tuition	+	-

☒

Use Budget Charges

Customize

Find

First

1-3 of 3

Last

*Budget Item Category		*ChargeType		
1 BOOK	Books and Supplies	Other	+	-
2 HSG	Housing	Room/Board	+	-
3 TUIT	Tuition and Fees	Tuition	+	-

Institutional Charges page

Define the charges to be used in the calculation. For example, you can use actual charges, such as tuition and fees, that are charged to the student from Campus Solutions Student Financials or you can use the default budget item values.

Use Actual Charges	Select to use charges calculated in Student Financials.
Item Type Group	For actual charges, enter the item type group. Examples of values are <i>ENRDEPOSIT</i> (enrollment deposits), <i>FINAID</i> (financial aid), <i>MYPAYPLANS</i> (multi-year pay plans), <i>PAYMENTS</i> , and <i>TUITION</i> .
Charge Type	Enter the type of charge or institutional charge associated with the item type group. Values are <i>Other</i> , <i>Room/Board</i> , and <i>Tuition</i> . This field is required.
Use Budgeted Charges	Select to use charges set up by your institution. The system uses budget items to calculate the student's COA.
Budget Item Category	Enter specific items or components for COA, such as books, supplies, tuition, transportation, housing, and fees.
Charge Type	Enter the type of charge or institutional charges associated with the budget item category. Values are <i>Other</i> , <i>Room/Board</i> , and <i>Tuition</i> . This field is required.

Chapter 18

(CAN) Setting Up Canadian Need Analysis

This chapter provides an overview of Canadian Need Analysis (CNAS) and discusses how to define CNAS.

Understanding CNAS

CNAS enables you to set up parameters your institution uses to calculate a student's financial need. You can set various calculation options at the institution, rule set, and student levels. The system allows you to load data files from the provincial Student Services Bureau, which governs the Ontario Student Assistance Plan (OSAP). The Student Services Bureau holds official eligibility data for the Canada Student Loans Program (CSLP), Canada Study Grant Program for Students with Dependents (CSG), and the Ontario Student Loans Plan (OSLP).

Defining CNAS

This section discusses how to:

- Define CNAS rules.
- Review CNAS message tables.
- Define CNAS Options for Tables 1, 2, and 3.
- Define financial parameters for minimum wage.
- Define financial parameters for moderate standard of living (MSOL) setup.
- Define financial parameters for parent MSOL setup.
- Define financial parameters for tuition and fees.
- Define financial parameters for parent weekly Canada student loan (CSL) contribution.
- Define financial parameters for parent weekly Ontario student loan (OSL) contribution.
- Define financial parameters for parent yearly income.
- Define financial parameters for program weekly maximum entitlements.
- Define financial parameters for prestudy tax deductions setup.
- Define financial parameters for study period tax deductions setup.

- Define financial parameters for spouse tax deductions.
- Define financial parameters for parent federal tax deductions.
- Define financial parameters for parent provincial tax deductions.
- Define financial parameters for part-time maximum entitlements.
- Add a full-time or part-time Canadian application.
- Set up cost codes.

Pages Used to Set Up CNAS

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CNAS Rule Setup	CNAS_SETUP_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Rule Setup	Set up options that affect your global and institutional CNAS calculations. The system includes predefined values for CSL and OSL rule sets. You can enter values for additional CNAS rule sets developed by your institution as needed by your business practices.
CNAS Messages	CNAS_MESSAGES	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Messages	Define or view the messages used by the CNAS calculation.
CNAS Option Tbl 1	CNAS_OPTION_TBL1	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table, CNAS Option Tbl 1	Define or view information about your Financial Aid rule sets. You can add options for other rule sets on these pages.
CNAS Option Tbl 2	CNAS_OPTION_TBL2	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table 2, CNAS Option Tbl 2	Define or view prestudy and study period option information.
CNAS Option Tbl 3	CNAS_OPTION_TBL3	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table 3, CNAS Option Tbl 3	Define or view various full-time student, part-time student, or parent options.

Page Name	Definition Name	Navigation	Usage
Minimum Wage	MIN_WAGE_CSL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Minimum Wage Setup	Define or view the minimum wage and minimum weekly work hour data for each province.
MSOL Setup	CSL_MSOL_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, MSOL Setup	Define or view the amounts designated as monthly living allowances for each province.
Parent MSOL Setup	PRT_MSOL_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent MSOL Setup	Define or view the family size and parent MSOL amounts designated as monthly living allowances for parents in each of the provinces.
Tuition and Fees	BUDGET_CAP_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Tuition and Fees Setup, Tuition and Fees)	Define or view the budget cap amounts for non-co-op and co-op programs.
Parent Weekly CSL	PRT_WKLY_CSL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Weekly CSL	Define or view information about parent income range, base income, and percent of parent annual discretionary income.
Parent Weekly OSL	PRT_WKLY_OSL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Weekly OSL	Define or view information about parent income range, base income, net income percentage, and percent of parent annual discretionary income based on requirements of the OSL.
Parent Yearly Inc (parent yearly income)	PRT_YEARLY_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Yearly Inc	Define or view information about family size, contribution limits, and which income formula to use in calculations.
Program Weekly Max (program weekly maximum)	PGM_WKLY_MAX	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Program Weekly Max	Define or view the maximum entitlement for CSL, CSG, and OSL programs based on student status categories.

Page Name	Definition Name	Navigation	Usage
Prestudy Tax Setup	STDNT_PS_TX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Prestudy Tax Setup	Define or view information about tax deductions from the student's monthly income during the prestudy period.
Study Pd Tax Setup (study period tax setup)	STD_SP_TX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Study Pd Tax Setup	Define or view information about tax deductions from the student's monthly income during the study period.
Spouse Tax Setup	SPS_MTHL_TX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Spouse Tax Setup	Define or view information about tax deductions from a student's spousal monthly income during the study period.
Parent Fed Tax	PRT_FED_TX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Fed Tax	Define or view information about federal tax deductions from the monthly income of the parents of a student during the study period.
Parent Prov Tax (parent provincial tax)	PRT_PROV_TX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Prov Tax	Define or view information about the provincial tax deductions from the monthly income of the parents of a student during the study period.
Part-time Max (part-time maximum)	PT_MAX_TBL	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Part-time Max	Define or view the maximum entitlement of part-time students for special opportunity grant (SOG) and part-time CSL loan programs based on family size.
Add Institutional Application	INST_ADD_GBL	Financial Aid, Canadian Application Data, Add Institutional Application	Define or view the application source code for a full-time or part-time student application.
Cost Code Setup	CAN_COST_CODE	Set Up SACR, Product Related, Financial Aid, Canada Application Processing, Cost Code Setup	Define or view the cost codes for your institution.

Defining CNAS Rules

Access the CNAS Rule Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Rule Setup).

CNAS Rule Setup

Academic Institution:

PSUNV

PeopleSoft University

Aid Year:

2004

Financial Aid Year 2003-2004

Copy CNAS Rule Set

*CNAS Rule Set	Description	Short Description		
CSL	Canada Student Loans	Canada Stu	+	-
OSL	Ontario Student Loans	Ontario St	+	-

CNAS Rule Setup page

The system displays the academic institution and the aid year. The system also displays the rule set for basic CSL and OSL calculations. To create additional rule sets, insert a new row.

- CNAS Rule Set

Enter a letter code to identify the CNAS rule set that you create.
- Description

Enter a description for the CNAS rule set that you create.
- Short Description

Enter a corresponding short description for the CNAS rule set that you create.

Click the CNAS Rule Set button to copy rule set information to another financial aid year and institution. You must enter the new institution and aid year.

Reviewing CNAS Message Tables

Access the CNAS Messages page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Messages).

CNAS Messages

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2004 Financial Aid Year 2003-2004

Copy CNAS Messages

CNAS Message Number	Description
10	Did not meet minimum provincial length requirement
20	Not Canadian citizen or permanent resident

CNAS Messages page

The system displays the academic institution and the aid year, as well as the CNAS message number and the message description. You can edit the message descriptions.

Click the Copy CNAS Messages button to copy message information to another financial aid year. You must click the copy button from an existing aid year, and then enter the academic institution and aid year that you want to create.

Defining CNAS Options - Table 1

Access the CNAS Option Tbl 1 (CNAS option table 1) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table, CNAS Option Tbl 1).

CNAS Option Tbl 1		CNAS Option Tbl 2		CNAS Option Tbl 3	
Academic Institution:	PSUNV	PeopleSoft University			
Aid Year:	2005	Financial Aid Year 2004-2005			
Copy CNAS Option Table					
CNAS Options Find View All First 1 of 2 Last					
CNAS Rule Set:	CSL	CSL		CSL-OSL:	C
Required High School Years:	4			Institution Province:	ON
Required Residence Length:	2	At least 12 Months		Award Period Use:	A Academic
Common-law Years:	3			Use Cost of Attendance:	F Fed Year COA
FM/IM Use:	F	FM EFC		<input type="checkbox"/> Workforce Option	<input type="checkbox"/> Use Caps
CSL Numeric Variable:	1			Budget Item Category Find 1 of 1 <input type="text"/> + -	
Prov Loan Numeric Variable:					
CSG Numeric Variable:	3				

CNAS Option Tbl 1 page

The system displays the academic institution and the aid year.

CNAS Rule Set The system displays the CNAS rule set used for basic calculations. Select a value to determine the type of calculation to perform. Values are:

C – *CSL*: Select to invoke Canadian rules for contributions and calculations.

O — *OSL*: Select to invoke OSL rules for contributions and calculations.

Required High School Years Enter the number of years that students are required to be out of high school to be considered independent.

Required Residence Length Enter translate values that correspond to translate values on the student's application.

1: Less than 12 months

2: At least 12 months

Common-law Years Enter the number of years of a student's common-law marriage that are required for a student to be considered independent.

FM/IM Use Select a value.

F: Select to update federal need and family contribution (FC) values with calculation results.

I: Select to update institutional need and family contribution values with calculation results.

B: Select to update both federal and institutional values.

CSL Numeric Variable	Select a numeric packaging variable in which to store the CSL amount. If you leave this field blank, the system does not write the value to packaging variables.
Prov Loan Numeric Variable (provincial loan numeric variable)	Select a numeric packaging variable in which to store the provincial loan amount. If you leave this field blank, the system does not write the value to packaging variables.
CSG Numeric Variable	Select a numeric packaging variable in which to store the CSG amount. If you leave this field blank, the system does not write the value to packaging variables.
Institution Province	Enter the province of your institution.
Award Period Use	Calculation results are populated in the Student Award Period record based on translate values. Select from the following values: A: Academic period. N: Nonstandard period. B: Both academic and nonstandard periods.
Use Cost of Attendance	Select which cost of attendance value is used. Values are: F: Fed Year COA (federal year cost of attendance) I: Inst Year COA (institutional year cost of attendance)
Workforce Option	Select to specify that students in workforce are considered independent.
Use Caps	Select to use budget caps associated with Additional Cost Recovery programs. This is necessary only if the academic program is not set up as deregulated.
Budget Item Category	Select which budget items to use in the budget cap calculation.

Click the Copy CNAS Option Table button from the CNAS Option Table 1 page to copy CNAS Option Table information to another financial aid year. Click the copy button from an existing aid year and then enter the academic institution and aid year that you want to create.

Defining CNAS Options - Table 2

Access the CNAS Option Tbl 2 (CNAS option table 2) page Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table, CNAS Option Tbl 2).

CNAS Option Tbl 1		CNAS Option Tbl 2		CNAS Option Tbl 3	
Academic Institution:	PSUNV	PeopleSoft University			
Aid Year:	2004	Financial Aid Year 2003-2004			
CNAS Options Find View All First ◀ 1 of 1 ▶ Last					
CNAS Rule Set: + -					
Prestudy Options			Study Period Options		
Prestudy Contribution Rate:	<input type="text" value="80.00"/>		Study Period Contribution Rate:	<input type="text" value="80"/>	
Prestudy Allow Against Minimum:	<input type="text" value="0"/>		Study Pd Allow Against Income:	<input type="text" value="600"/>	
Prestudy Allow Against Actual:	<input type="text" value="0"/>		Study Pd Govt Benefit Allow:	<input type="text" value="0"/>	
Prestudy Minimum Contribution:	<input type="text" value="0"/>		Study Pd Govt Contrib Rate:	<input type="text" value="100.00"/>	
Prestudy Maximum Weeks:	<input type="text" value="16"/>		Study Period Spouse Percent:	<input type="text" value="80.00"/>	
Prestudy Minimum Weeks:	<input type="text"/>				
Prestudy Spouse Percent:	<input type="text" value="50.00"/>				

CNAS Option Tbl 2 page

The student and the student's family are expected to contribute to the costs of post-secondary education. Students from all categories, as well as the spouses of married students, are expected to work during the prestudy period and to contribute to the student's educational costs. Prestudy period income contributions are based on rates and allowances established by Statistics Canada for all of the provinces. The calculation of a student's study period contribution depends on whether the student's program of study is considered deregulated or regulated by the Ministry of Education and Training.

The system displays the academic institution, the aid year, and the CNAS rule set that is selected on the CNAS Option Table 1 page.

Prestudy Options

Prestudy Contribution Rate	Enter the rate used to calculate the expected prestudy contribution from actual income.
Prestudy Allow Against Minimum	Enter a dollar amount used as an allowance against the minimum student contribution.
Prestudy Allow Against Actual	Enter a CAD amount used as an allowance against the actual student contribution calculated.
Prestudy Minimum Contribution	Enter a minimum prestudy student contribution to be enforced when the actual result of the calculation is below minimum.
Prestudy Maximum Weeks	Enter the number of weeks that are considered as the prestudy work period.

Prestudy Minimum Weeks	Enter the minimum number of prestudy weeks required to charge a minimum student contribution.
Prestudy Spouse Percent	Enter the percent of the student's spousal income that is considered in calculating the contribution.

Study Period Options (CSL Rule Set)

Different fields appear depending on which rule set is selected. Some fields appear for both CSL and OSL.

Study Period Contribution Rate	(CSL only) Enter the rate used to calculate the expected study period contribution from actual income.
Study Pd Allow Against Income (study period allowed against income)	(CSL only) Enter an amount used as an allowance against the actual calculated student contribution.
Study Pd Govt Benefit Allow (study period government benefits allowance)	(Both CSL and OSL) Enter an amount used to reduce the living allowance in the assessment of costs for the student.
Study Pd Govt Contrib Rate (study period government contribution rate)	(Both CSL and OSL) Enter the percent of the student's expected income from government benefits, typically 100 percent.
Study Period Spouse Percent	(CSL only) Enter the percent of the student's spousal income that is considered in calculating the contribution.

Study Period Options (OSL Rule Set)

The following fields appear in the Study Period Options group box when the OSL rule set is selected.

Study Pd Allowance - Merit (study period allowance for merit)	Enter the weekly study period allowance used to reduce the contribution from income for students who receive merit scholarships.
Study Pd Allowance - Non-Merit (study period allowance for non-merit)	Enter the weekly study period allowance used to reduce the contribution from income for students who do not receive scholarships.
Study Pd Spouse Pct 1 in Col (study period percentage spouse 1 in college)	Enter the percentage of the student's spousal income that is considered in calculating the contribution if only the student is in college.
Study Pd Spouse Pct 2 in Col (study period percentage spouse 2 in college)	Enter the percentage of the student's spousal income that is considered in calculating the contribution if both the student and the spouse are in college.

See Also*Canada Student Loan Manual***Defining CNAS Options - Table 3**

Access the CNAS Options Tbl 3 (CNAS option table 3) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Option Table, CNAS Option Tbl 3).

CNAS Option Tbl 1		CNAS Option Tbl 2		CNAS Option Tbl 3	
Academic Institution:	PSUNV	PeopleSoft University			
Aid Year:	2004	Financial Aid Year 2003-2004			
CNAS Options Find View All First 1 of 1 Last					
CNAS Rule Set: + -					
RRSP Yearly Adjustment:	2,000	Parent Options			
Disability Exemption 1:	3,000	Parent CPP Maximum: 1186.50			
Disability Exemption 2:	5,500	Parent Maximum Employment Ins: 994.50			
Disability Exemption 3:	500	Parent Income Allowance: 0.00			
Car Allowance:	5,000	Parent Contrib Calc w/Table E: N			
Asset Allowance:	0	Part-Time Options			
Asset Contribution Rate:	100.00	Part-time Percentage: 60			
Full-Time Loan Minimum Amount:	100	Part-time Disabled Percentage: 40			
Part-Time Loan Minimum Amount:	100				

CNAS Option Tbl 3 page

The system displays the academic institution, aid year, and CNAS rule set selected on the CNAS Option Tbl 1 page.

RRSP Yearly Adjustment (registered retirement savings plans yearly adjustment)	Enter the annual amount of retirement accounts registered to students and to student and spouse or common-law partner, if applicable, that are recognized as an allowance.
Disability Exemption 1	Enter the amount allowed for a student's first disability.
Disability Exemption 2	Enter the amount allowed for a student's second disability.
Disability Exemption 3	Enter the amount allowed for a student's third disability.
Car Allowance	Enter the amount allowed for a student-owned vehicle. The Financial Aid Administrator can increase the asset exemption level for vehicles up to 10,000 CAD in specific situations.

Asset Allowance	Enter the exemption amount allowed to reduce asset value.
Asset Contribution Rate	Enter the percentage rate used to assess a contribution based on assets.
Full-Time Loan Minimum Amount	Enter the minimum amount that can be loaned to a full-time student.
Part-Time Loan Minimum Amount	Enter the minimum amount that can be loaned to a part-time student.

Parent Options

Parent CPP Maximum	Enter the maximum annual contribution allowance for parents to the Canada Pension Program (CPP) based on income.
Parent Maximum Employment Ins (parent maximum employment insurance)	Enter the maximum annual contribution allowance for parents to the Employment Insurance program.
Parent Income Allowance	Enter the allowance amount that is applied against parents' income.
Parent Contrib Calc w/Table E (parent contribution calculation with table E)	Enter Y (yes) to base the calculation for the parents' contribution on information contained in Table E in the <i>Ontario Student Assistance Program Manual</i> .

Part-Time Options

Part-time Percentage	Enter the percentage of a full class load under which a student is considered a part-time student.
Part-time Disabled Percentage	Enter the percentage of a full class load under which a student with a disability is considered a part-time student.

Defining Financial Parameters for Minimum Wage

Access the Minimum Wage page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Minimum Wage Setup, Minimum Wage).

Minimum Wage		MSOL Setup	Parent MSOL Setup	Tuition and Fees	Parent Weekly CSL	Parent Weekly OSL	
Academic Institution:		PSUNV	PeopleSoft University				
Aid Year:		2005	Financial Aid Year 2004-2005				
Copy CNAS Setup							
*Province		Hourly Minimum Wage	Minimum Weekly Hours				
AB	Alberta	5.00	35.00	+	-		
BC	British Columbia	7.00	34.10	+	-		
MB	Manitoba	5.40	35.00	+	-		
NB	New Brunswick	5.50	35.00	+	-		
NF	Newfoundland (NF)	5.25	35.00	+	-		
NL	Newfoundland (NL)	5.25	35.00	+	-		
NN	Nunavut (NN)	5.35	35.00	+	-		
NS	Nova Scotia	5.50	34.90	+	-		
ON	Ontario	6.85	34.50	+	-		

Minimum Wage page

The Defining Financial Parameters component, of which this page is a part, stores table data for financial need assessment.


The system displays the academic institution and the aid year.

This page lists each province with its corresponding hourly minimum wage and minimum weekly hours that are considered as full-time work.



To copy a new academic institution or aid year, click the Add a New Value button at the Search level. Enter the academic institution and aid year. The Copy CNAS Setup button appears. Enter the academic institution and aid year information in the Copy From fields.


Defining Financial Parameters for MSOL Setup

Access the MSOL Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, MSOL Setup).

Minimum Wage **MSOL Setup** Parent MSOL Setup Tuition and Fees Parent Weekly CSL Parent Weekly OSL 

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2005 Financial Aid Year 2004-2005

Find First  1 of 1  Last

MSOL Student Category: 

Province		Monthly Living Allowance		
AB	Alberta	692	+	-
BC	British Columbia	890	+	-
MB	Manitoba	716	+	-
NB	New Brunswick	700	+	-
NF	Newfoundland (NF)	714	+	-
NS	Nova Scotia	746	+	-
NT	Northwest Territories	1103	+	-
ON	Ontario	892	+	-
PE	Prince Edward Island	705	+	-
QC	Quebec	676	+	-
SK	Saskatchewan	688	+	-

MSOL Setup page

The system displays the academic institution and the aid year.

MSOL Student Category

Enter a value for the moderate standard of living student category. Values are:

- 1: Single away from home
- 2: Single Parent
- 3: Married
- 4: Dependent Person
- 5: Single at Home

This page lists each province, with the corresponding monthly living allowance amount.

Defining Financial Parameters for Parent MSOL Setup

Access the Parent MSOL Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent MSOL Setup).

Minimum Wage	MSOL Setup	Parent MSOL Setup	Tuition and Fees	Parent Weekly CSL	Parent Weekly OSL	D
Academic Institution: PSUNV PeopleSoft University Aid Year: 2005 Financial Aid Year 2004-2005						
Family Size	Parent MSOL Amount					
2	31,600			+	-	
3	36,600			+	-	
4	40,900			+	-	
5	44,700			+	-	
6	48,000			+	-	
7	50,800			+	-	
8	53,100			+	-	
9	54,900			+	-	
10	56,200			+	-	

Parent MSOL Setup page

The system displays the academic institution and the aid year.

Family Size Enter the family size. For a dependent student, family size includes the student, parents, and dependent siblings. For an independent student, family size includes the student, the student's spouse, and any dependent children living with the student full-time during the study period.

Parent MSOL Amount Enter the MSOL amount for each family size.

Defining Financial Parameters for Tuition and Fees

In the OSL assessment, the value of tuition and compulsory fees used may be capped. The tuition, compulsory fees, and number of terms are used in certain need calculations for which fees are capped.

Access the Tuition and Fees page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Tuition and Fees Setup, Tuition and Fees).

Minimum Wage	MSOL Setup	Parent MSOL Setup	Tuition and Fees	Parent Weekly CSL	Parent Weekly OSL	D
Academic Institution: PSUNV PeopleSoft University Aid Year: 2005 Financial Aid Year 2004-2005						
Number of Terms	Non-Coop Cap	Co-op Cap				
1	2,250	2,675			+	-
2	4,500	5,350			+	-
3	6,750	8,025			+	-

Tuition and Fees page

The system displays the academic institution and the aid year.

Number of Terms Enter the number of terms attended by the student.

Non-Coop Cap Enter the combined cap amounts for tuition and compulsory fees for provincial colleges and universities for noncooperative programs. Tuition and fees are capped based on whether a program is regulated.

Co-op Cap Enter the combined cap amounts for tuition and compulsory fees for provincial colleges and universities for cooperative programs. Tuition and fees are capped based on whether a program is regulated.

Defining Financial Parameters for Parent Weekly CSL Contribution

Access the Parent Weekly CSL page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Weekly CSL).

Minimum Wage	MSOL Setup	Parent MSOL Setup	Tuition and Fees	Parent Weekly CSL	Parent Weekly OSL	D
Academic Institution: PSUNV PeopleSoft University Aid Year: 2004 Financial Aid Year 2003-2004						
Parent Income From	Parent Income To	Parent Base Income	Parent ADI Percentage			
0	2,999	0	45.00	+	-	
3,000	5,999	1,350	60.00	+	-	
6,000	999,999	3,150	75.00	+	-	

Parent Weekly CSL page

The system displays the academic institution and aid year.

This page shows the range of parent income, with the corresponding parent base income and the parent ADI (annual discretionary income). The system uses this information to calculate the parents' weekly contribution in the CSL assessment.

Defining Financial Parameters for Parent Weekly OSL Contribution

Access the Parent Weekly OSL page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Weekly OSL).

Minimum Wage	MSOL Setup	Parent MSOL Setup	Tuition and Fees	Parent Weekly CSL	Parent Weekly OSL
Academic Institution: PSUNV PeopleSoft University Aid Year: 2004 Financial Aid Year 2003-2004					
Parent Income From	Parent Income To	Parent Net Income Percentage	Parent Base Income	Parent ADI Percentage	
-999,999	0	3.00	0	0.00	+ -
0	2,999	3.00	0	45.00	+ -
3,000	5,999	3.00	1,350	60.00	+ -
6,000	999,999	3.00	3,150	75.00	+ -

Parent Weekly OSL page

The system displays the academic institution and the aid year.

This page shows the parent income range, with the corresponding parent net income percentage, parent base income, and parent ADI. The system uses this information to calculate the parents' weekly contribution in the OSL assessment.

Defining Financial Parameters for Parent Yearly Income

Access the Parent Yearly Inc (parent yearly income) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Yearly Inc).

Parent Weekly OSL	Parent Yearly Inc	Program Weekly Max	Prestudy Tax Setup	Study Pd Tax Setup
Academic Institution: PSUNV PeopleSoft University Aid Year: 2004 Financial Aid Year 2003-2004				
Family Size	No Contribution Limit	Formula A From	Formula A To	Formula B From
2	30,000	30,000	39,999	39,999
3	35,000	35,000	46,999	46,999
4	40,000	40,000	52,999	52,999
5	45,000	45,000	58,999	58,999
6	48,000	48,000	63,999	63,999
7	50,000	50,000	66,999	66,999
8	52,000	52,000	69,999	69,999
9	54,000	54,000	72,999	72,999
10	55,000	55,000	73,999	73,999

Parent Yearly Inc page

The system uses two different methods to determine the expected level of parental contribution for OSL, depending on the amount of parental gross income reported on the OSAP application. Check the level of gross parental income for the family size determined in the *OSAP Student Eligibility and Financial Need Assessment Manual*.

The system displays academic institution and aid year.

You can enter or view information about the Family Size, No Contribution Limit, Formula A From, Formula A To, and Formula B From fields.

See Also

Canada Student Loan Manual

Defining Financial Parameters for Program Weekly Maximum Entitlements

Access the Program Weekly Max (program weekly maximum) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Program Weekly Max).

Parent Weekly OSL

Parent Yearly Inc

Program Weekly Max

Prestudy Tax Setup

Study Pd Tax Setup

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2004 Financial Aid Year 2003-2004

Program Student Category	CSL Maximum	CSG Maximum	OSL Maximum		
Single Independent/Dependent	165		110	+	-
Married Students no dependents	165		335	+	-
Married/Sole Support 1-2 deps	165	40	295	+	-
Married/Sole Support, 3+ deps	165	60	275	+	-

Program Weekly Max page

The system displays the academic institution and the aid year.

- Program Student Category**

Select the category into which the student belongs for a program. These values are delivered with the system.
- CSL Maximum**

Enter the CSL maximum for each program student category.
- CSG Maximum**

Enter the CSG maximum for each program student category.
- OSL Maximum**

Enter the OSL maximum for each program student category.

Defining Financial Parameters for Prestudy Tax Deductions Setup

Access the Prestudy Tax Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Prestudy Tax Setup).

Prestudy Tax Setup		Study Pd Tax Setup	Spouse Tax Setup	Parent Fed Tax	Parent Prov Tax	Part-time Max
Academic Institution:	PSUNV	PeopleSoft University				
Aid Year:	2004	Financial Aid Year 2003-2004				
Monthly Income From	Monthly Income To	Tax Rate				
1	1,249	5.76	+	-		
1,250	2,999	8.93	+	-		
3,000	999,999	12.71	+	-		

Prestudy Tax Setup page

The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's monthly income during the prestudy period.

Defining Financial Parameters for Study Period Tax Deductions Setup

Access the Study Pd Tax Setup (study period tax setup) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Study Pd Tax Setup).

Prestudy Tax Setup		Study Pd Tax Setup	Spouse Tax Setup	Parent Fed Tax	Parent Prov Tax	Part-time Max
Academic Institution:	PSUNV	PeopleSoft University				
Aid Year:	2004	Financial Aid Year 2003-2004				
Monthly Income From	Monthly Income To	Tax Rate				
1	199	5.76	+	-		
200	999	8.93	+	-		
1,000	1,749	12.71	+	-		
1,750	2,499	16.24	+	-		
2,500	999,999	18.48	+	-		

Study Pd Tax Setup page

The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's monthly income during the study period.

Defining Financial Parameters for Spouse Tax Deductions Setup

Access the Spouse Tax Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Spouse Tax Setup).

Prestudy Tax Setup		Study Pd Tax Setup		Spouse Tax Setup		Parent Fed Tax		Parent Prov Tax		Part-time Max	
Academic Institution:		PSUNV		PeopleSoft University							
Aid Year:		2004		Financial Aid Year 2003-2004							
Monthly Income From		Monthly Income To		Tax Rate							
1		499		5.76		+		-			
500		999		8.86		+		-			
1,000		1,499		13.03		+		-			
1,500		1,999		16.75		+		-			
2,000		2,499		19.14		+		-			
2,500		3,999		23.25		+		-			
4,000		999,999		31.03		+		-			

Spouse Tax Setup page

The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's spousal monthly income during the study period.

Defining Financial Parameters for Parent Federal Tax Deductions

Access the Parent Fed Tax (parent federal tax) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Fed Tax).

Prestudy Tax Setup		Study Pd Tax Setup		Spouse Tax Setup		Parent Fed Tax		Parent Prov Tax		Part-time Max	
Academic Institution:		PSUNV		PeopleSoft University							
Aid Year:		2004		Financial Aid Year 2003-2004							
Monthly Income From		Monthly Income To		Tax Rate							
1		499		5.76		+		-			
500		999		8.86		+		-			
1,000		1,499		13.03		+		-			
1,500		1,999		16.75		+		-			
2,000		2,499		19.14		+		-			
2,500		3,999		23.25		+		-			
4,000		999,999		31.03		+		-			

Parent Fed Tax page

The system displays the academic institution and the aid year.

This page lists the monthly income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's parents' monthly federal income during the study period.

Defining Financial Parameters for Parent Provincial Tax Deductions

Access the Parent Prov Tax (parent provincial tax) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Parent Prov Tax).

←

Prestudy Tax Setup

Study Pd Tax Setup

Spouse Tax Setup

Parent Fed Tax

Parent Prov Tax

Part-time Max

Academic Institution:

PSUNV

PeopleSoft University

Aid Year:

2004

Financial Aid Year 2003-2004

Monthly Income From	Monthly Income To	Tax Rate		
1	499	5.83	+	-
500	999	11.50	+	-
1,000	1,499	15.20	+	-
1,500	1,999	17.90	+	-
2,000	2,499	20.10	+	-
2,500	3,999	23.90	+	-
4,000	999,999	25.90	+	-

Parent Prov Tax page

The system displays the academic institution and the aid year.

This page lists the Monthly Income range, with the corresponding tax rate, which is the percentage of income to be deducted from a student's parents' monthly provincial income during the study period.

Defining Financial Parameters for Part-time Maximum Entitlements

Access the Part-time Max (part-time maximum) page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, CNAS Setup, Part-time Max).

Prestudy Tax Setup	Study Pd Tax Setup	Spouse Tax Setup	Parent Fed Tax	Parent Prov Tax	Part-time Max
Academic Institution: PSUNV PeopleSoft University					
Aid Year: 2004 Financial Aid Year 2003-2004					
Family Size	SOG Maximum	Part-time Loan Maximum			
1	14,100	26,100	+	-	
2	23,300	34,800	+	-	
3	31,900	43,600	+	-	
4	37,800	50,500	+	-	
5	43,700	56,300	+	-	
6	48,600	62,400	+	-	
7	53,000	68,300	+	-	

Part-time Max page

The system displays the academic institution and the aid year.

Family Size Enter the student's family size for each maximum amount.

SOG Maximum Enter the maximum SOG for each family size. The maximum amounts are based on the maximum total family gross income, assets, and family size.

Part-time Loan Maximum Enter the maximum for a part-time CSL for each family size. The maximum amounts are based on the maximum total family gross income, assets, and family size.

Adding a Full-time or Part-time Canadian Application

Access the Add Institutional Application page (Financial Aid, Canadian Application Data, Add Institutional Application).

Add Institutional Application			
Joan Jaffe		ID:	FA0276
Aid Year:	2004	Financial Aid Year 2003-2004	Institution: PSUNV
		Find	First 1 of 1 Last
*Application Source Code:	0	FT Canada Student Loan	+

Add Institutional Application page

The system displays the student name and ID, aid year, and institution.

Application Source Code Select an application source code. Values for Canadian institutions are:
O: Full-time Canada Student Loan.
P: Part-time Canada Student Loan.

Part-time applications must have a source code of P (part-time) to ensure correct CNAS calculation.

Setting Up Cost Codes

Access the Cost Code Setup page (Set Up SACR, Product Related, Financial Aid, Canada Application Processing, Cost Code Setup).

Cost Code Setup

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2004 Financial Aid Year 2003-2004
Academic Career: UGRD Undergraduate

[Copy Cost Codes](#)

Sixty Percent Point in Time is required. Customize | Find | View All | First 1-4 of 4 Last

	*Academic Program	*Loan Year	*Term	Description	FA Weeks	Start Date for Gen Standing PO	End Date	Cost Code	Regulated Program		
1	LAU	1	0507	2003 Fall Qtr	12	09/06/2003	12/20/2003	CANADA			
2	LAU	1	0518	2004 Spring	12	01/20/2004	05/15/2004	CANADA			
3	LAU	1	0522	2004 Summer	12	05/25/2004	08/13/2004	CANADA			
4	LAU	1	0524	2004 Summer Qtr	12	06/19/2004	08/11/2004	CANADA			

Cost Code Setup page

The system displays the academic institution, aid year, and academic career.

Enter values for the cost codes for your institution for each of the fields.

To copy a new academic institution, aid year, or academic career, enter the new parameters at the search level. The system displays the Copy Cost Codes button. Click the button and enter the academic institution, aid year, and career information in the Copy From fields. After you enter information in the Copy From fields, the system displays the Academic Program and To Term fields.

Chapter 19

Managing Financial Aid Terms

This chapter provides an overview of financial aid terms and discusses how to:

- Build financial aid terms online.
- Build financial aid terms manually.
- Build financial aid terms in batch.
- Use the Financial Aid Term Census report.

Understanding Financial Aid Terms

This section lists prerequisites and discusses methods to build financial aid terms.

See Also

[Chapter 3, "Setting Up Financial Aid Terms," Understanding Financial Aid Terms, page 47](#)

Prerequisites

Before you begin setting up and building financial aid terms, complete the setup tasks discussed in the "Setting Up Financial Aid Terms" chapter.

You must understand level/load rules. These rules determine a student's academic level and academic load and are set up as part of the PeopleSoft Enterprise Student Records setup. You should jointly set up level/load rules with the student records staff. Financial aid term data is driven by these level/load rules, so you need to know how they are set up for your institution.

Financial aid term data also depends upon career information, including career primacy information, from the Academic Career Table component.

Your institution also needs to have set up academic programs, because financial aid term uses program information when building a student's financial aid term. Financial aid terms are built only for programs that are designated as financial aid eligible.

You should also review the Valid Terms for Careers page. When you select which terms should be built as financial aid terms for each career by the online and background financial aid term process, only the terms defined as valid for each career on this page are available for selection.

See Also

[Chapter 3, "Setting Up Financial Aid Terms," page 47](#)

[Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Valid Programs for Aid Year and Career, page 25](#)

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Level and Load Rules

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Careers

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Programs

Methods to Build Financial Aid Terms

You can build Financial Aid Terms in one of three ways:

- Manually
- Online
- In batch

Use the manual build process when data from Student Records is not available for a student, when you receive new records, or after an add/drop period. To build a financial aid term manually for a student, you must enter all required data in the Financial Aid Term component. The data you enter manually is replaced when term enrollment, program, or admissions data becomes available for the student.

Build terms online if there are records for a student from Student Records and you want to see this data or the changes to this data. Click the Build button on the FA Term page to run the online build process.

Build terms in batch to process multiple students at the same time using data from Student Records or PeopleSoft Enterprise Recruiting and Admissions (if you choose to build for both updates and projections). To build financial aid terms in batch, create an FA Term driver record and then run the background process using the FA Term driver record on the Build FA Terms page.

Building Financial Aid Terms Online

This section lists common elements and discusses how to:

- Set overrides for financial aid term.
- Build a financial aid term.
- View term build details.
- Override census date locking.

- View academic advisor information.
- View campus information.
- View academic level and load information.
- View HERA academic levels.
- View academic statistics.
- View transfer credit information.
- View term statistics for a student's other career.
- View a list of the student's classes.
- View loan, graduation, and budget information.
- View changes in a student's FA Term information.
- View Student Records term information.
- View withdrawal information.

Common Elements

Calculated Values

This column displays the values calculated by the system during the financial aid term build process for the associated fields. These values are based on the student's enrollment, academic and financial load, and academic level. The calculated values exist only when the FA Term is built online or in batch. If you build the financial aid term manually, the system does not display the calculated values. If you update the values manually, the calculated values do not change.

Seq (sequence)

Displays the number automatically assigned when you create a new effective-dated row. The sequence number provides a unique identifier when two rows exist with the same effective date.

Pages Used to Build Financial Aid Terms Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Term	STDNT_FA_TERM	Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term	Build a term or view a student's term information. You can also override the lock on Financial Aid Term values using this page.
FA Term Build Statistics	FA_TERM_STATS_SEC	Click the Build Info link on the FA Term page.	View term build details.

Page Name	Definition Name	Navigation	Usage
FA Term Census Date Locking	STDNT_FA_TRM_CENDT	Click the Census Date link on the FA Term page.	Override the census date locking feature at the student level. View the locked fields and the value used if you unlock the census date. When you override the census date lock, the override applies only to the term displayed on this page—not the entire aid year. For example, overriding the fall term does not override the spring term.
FA Term Academic Advisor Information	STDNT_FA_ADVIS	Click the Advisor link on the FA Term page.	View or assign the student's academic advisor. This includes data on the advisor's role and committee affiliation.
FA Term Campus Information	STDNT_FA_CAMP_SEC	Click the Campus Info link on the FA Term page.	View or modify the campus (physical location) where the student receives financial aid, registrar, and advising services.
Acad Level (academic level)	STDNT_FA_ACAD_LVL	Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level	View, add, or update a student's academic level and load (academic and financial aid) information for a particular term.
HERA Academic Level	STDNT_FA_ASGAL_SEC	Click the View HERA Academic Level link on the Acad Level page.	View a student's HERA academic level calculated by FA Term.
Statistics	STDNT_FA_STATS	Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics	View, add, or update a student's academic statistics including GPA (grade point average), residency information, and progress for a term.
FA Term Transfer Credits	STDNT_FA_STAT_TC	Click the Transfer Credit link on the Statistics page.	View transfer credit information for a student. This includes transfer credit for test scores on the Advanced Placement test or SAT II tests.
FA Term Other Units	STDNT_FA_STAT_INEL	Click the Other Units link on the Statistics page.	View term statistics for a student's other academic career.

Page Name	Definition Name	Navigation	Usage
FA Term Class Detail	STDNT_FA_CLASS_SEC	Click the Class Detail link on the Statistics page.	View a list of the student's classes. Indicates whether the classes are Open Entry/Open Exit sessions and providing start and end dates for each class.
Financial Aid Info	STDNT_FA_LOAN	Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info	View or modify loan, graduation, and budget information that is relevant to financial aid processing for a term.
FA Term Field Audits	STDNT_FA_AUDIT_SEC	Click the Field Audits link on the Financial Aid Info page.	View changes in a student's FA Term information from the previous effective-dated row.
Records/Term Info	STDNT_FA_REC	Financial Aid, Financial Aid Term, Maintain Student FA Term, Records/Term Info	View or modify the student's Student Records information for a term.
Withdrawal Info	STDNT_FA_WITHDRAW	Financial Aid, Financial Aid Term, Maintain Student FA Term, Withdrawal Information, Withdrawal Info	View withdrawal information from Student Records.

Setting Overrides for Financial Aid Term

While the system continues to set override fields automatically by changes in FA term data, you can set or reverse the settings based on your business requirements. When you manually modify FA term information, the system evaluates the selected field and compares the changed value with the corresponding calculated value. If the values are not equal, the system activates the override check box. Conversely, if the values match, the system clears the check box. The FA term build process can also set the override for selected fields when the field value does not match the calculated value. There are no changes to the FA term build process to accommodate the override fields.

Building a Financial Aid Term

Access the FA Term page (Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term).

The screenshot displays the 'FA Term' page for John Suazo, FA0600. The 'Term Information' section shows the institution as PeopleSoft University, term 0560 for the 2006 Spring semester. The 'Student Data' section shows an override effective date of 01/13/2005, sequence 1, and an active status. The 'Calculated Values' section shows values for GRAD, GSCI, and UNDECL-GR. The 'Override' section includes fields for Career (Graduate), Prim Prog (GSCI), Acad Plan (UNDECL-GR), Sub-Plan, Aid Year (Financial Aid Year 2005-2006), and Billing Career (Graduate). The 'Override' section also includes checkboxes for Projections, Override Expiration Date, Campus (MAIN), Academic Year (2006), and Eligible to Enroll. A 'Build' button is present, along with links for Build Info, Census Date, Advisor, and Campus Info.

FA Term page

Previously, when students had more than one academic plan for their primary academic program, the FA term process evaluated the academic plan value and selected plans in alphabetical order. Now, in these cases, the FA term process uses the academic plan with the lowest academic plan sequence number. This change provides you with the ability to control the plan that is used by the FA term build process. You can use the Student Program/Plan component to reset the plan sequence number so that the next time the FA term process runs, it uses the academic plan that you want.

Term

If you are building terms manually, enter the term value. Otherwise, the Financial Aid Term build process updates this field. The build process only builds terms that are defined for the given aid year.

Note. FA Term uses the setup tables for Valid Careers for Aid Year and Valid Terms for Career to determine which aid year a term should be linked to. If you set up future terms, you must set up the corresponding aid year for those future terms. For example, if you had not set up 2005-2006 and were to run FA Term only for 2004-2005, the system would not recognize a term outside of the academic/aid year.

Billing Career

The financial aid term build process populates this field with information from the Term Activation page in Student Records. This field is for use in equations (budget or packaging) and any changes made to the field are discarded during the next build. PeopleSoft Enterprise Student Financials uses the value for billing career from the Term Activation page during tuition calculation.

Career, Prim Prog (primary program), Acad Plan (academic plan), Sub-Plan, and Aid Year

You can override the values in these fields by selecting a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field.

FA Calc (financial aid calculation)

Select to require the financial aid term build process to determine whether changes have occurred to the student's data in Student Records or Admissions (such as enrollment changes). After you have selected this check box, click Save and then click Build. If a change has occurred, this term and all following terms are rebuilt using the new information.

Note. In most cases, the build process automatically determines whether changes have occurred in Student Records information and rebuilds terms with changed records data. This is triggered by changes to fields defined in PS_STDNT_CAR_TE_VW.

Projections

Select to instruct the build process to build a term in projection if necessary. The build process tries to build each term that you have selected on the FA Term Setup page, using a variety of sources. The build process looks for data in the following order:

1. Term enrollment data in Student Records.

If this data is found, the financial aid term is not built with projected data and has a source of *Term*.

2. Program information for the student in Student Records.

If this data is found, the financial aid term is built in projection and has a source of *Program*.

3. Program information from the student's application in Recruiting and Admissions.

If this data is found, the financial aid term is built in projection and has a source of *Admissions*.

If the build process cannot find any of these three sources of information, the financial aid term is built with a source of *No Data*. The financial aid term build process does not build terms in future aid years in projection; it only builds terms in future aid years for which enrollment data exists.

It is possible to build a projected FA term record of source admission or program for a student who is term activated after the start of the term. The FA Term build process uses the term activation deadline date maintained by Student Records to determine whether a projected FA term record can be built for a student. By default, term activation can occur until the start of the term, but this date can be modified to permit rolling enrollment of students in the term. The Max Program Effdt for Term field in the Term/Session Table component is where you can modify this setting. Verify with your student records staff their term activation policies to determine the effect on financial aid application processing.

Note. You cannot build a term in projections after the financial aid census date has passed. Any terms that are still in projections on the financial aid census date automatically have their values set to zero, with a build source of *No Data*. Additionally, if the student has no financial aid awards for the term, system sets the effective status of the term to inactive. The financial aid census date for each term is entered in the FA Census Date field on the FA Term Setup page.

Override Expiration Date	<p>When you select a value that differs from the value in the Career, Prim Prog, Acad Plan, Sub-Plan, Aid Year, and Billing Career fields, the Financial Aid Build routine does not recalculate the field for the associated term. All override fields, except the HERA WI fields, are recalculated using the calculated values.</p> <p>To have the build process use Student Records data after a certain date in the term, enter that date in this field. When you run the build process on or after this date, the override values you entered are ignored and data from Student Records is used.</p>
Campus	Indicates the physical location of the administrative services associated with the student's academic program.
Eligible to Enroll	For informational purposes only. Displays the same value as the Eligible to Enroll check box on the Term Activation page in Student Records. When selected, the Student Records batch enrollment selects and processes the student.
Build	<p>Click to build a term for the student using the system rules established on the FA Term Setup page. The system builds a term only if Student Records contains data for the student, unless you have selected the Projections check box—then the build process uses projected enrollment data. If one or more of the audited fields have changed, a new effective-dated row is automatically inserted.</p> <p>See Chapter 19, "Managing Financial Aid Terms," Viewing Changes in a Student's FA Term Information, page 531.</p>
Build Info	Click to access the FA Term Build Statistics page and view details for the build.
Census Date	Click to access the FA Term Census Date Locking page and view the census date and fields locked after the census date and override the census date.
Advisor	Click to access the FA Term Academic Advisor Information page and view or enter information regarding a student's advisor. This includes data on the advisor's role and committee affiliation.
Campus Info	Click to access the FA Term Campus Information page and view the student's Financial Aid Campus, Registrar Campus, and Advisement Campus.

Setting Terms to Inactive

Setting the most recent effective-dated FA Term record effectively removes that term from becoming recognized by all other financial aid processes. Rather than delete FA Term rows, you should make rows inactive. If you attempt to set an FA Term to inactive, a warning message appears if the student has a budget for the term. If so, first verify that the student has no awards for the term and make any required adjustments to the student's awards before setting the term inactive. The FA disbursement processes cannot be run for inactive terms. The system displays another warning message if the student has enrollment data for the term.

There is functionality in the FA Term build process where the term source is set to No Data—no enrollment data exists for the term after census or the end of the term. If the student has no awards for the term, the system sets the term to an inactive status. If, however, the student has an award for the term with either an offered amount, authorized amount, or disbursed amount greater than zero, the term remains in an active status. In addition, future terms recalculate cumulative units, projected levels, NSLDS Lending and Direct Lending loan years and not include data from terms with a source of No Data regardless of the status of the term.

Term Progression

Student Records contains functionality that enables you to increment student academic levels by term and not by units to address cooperative system progression rules and graduate studies progression rules. The FA Term Build process recognizes progression by terms.

During the build process, the system checks whether the level determination on the Level/Load Rules Table page is *Units*, *Terms*, *Manual*, or *Default*. If the level determination is *Terms*, then the FA Term Build process calculates the academic level, NSLDS Loan Year, and Direct Lending Year using the student's terms in residence.

When you are building terms for projected enrollment, the student's academic load comes from the admissions application or the academic program. The FA Term Build process then uses this academic load to calculate the term count for the projected term.

Students in academic programs using progression by term may not always enroll in courses. Because terms in which the student does not enroll in courses are built with projected data, you need to understand the *No Data* value for the Source field on the FA Term Build Statistics page, which affects past projected terms. To ensure that students in this situation are progressing correctly, you may need to go back and build past aid years to show the student's actual progression.

Career Primacy

In determining the career value, in the case where the student has multiple valid careers, career primacy is enforced based on the term source. For example, the evaluation of career primacy is sensitive to the term source. Based on the term source of the FA Term record, the system evaluates only careers at that source level and applies primacy rules when more than one career exists. FA Term ranks term source in the following priority order:

1. 1st Term (student has enrollment data for the term).
2. 2nd Program (student is active for an academic program).
3. 3rd Admissions (student has an active admissions application).

When the FA Term build process runs and determines the source of the term in process, the system can only assign careers at that level to the term.

This table is an example of career and primacy.

<i>Career</i>	<i>Primacy</i>
UGRD	1
UENG	4

This table is an example of career primacy based on the term source.

Example/Condition	FA Term Career Used (Term Source)
Student admitted in UGRD. Student also admitted in UENG.	UGRD (Admission) <i>Primacy was applied at the admission level.</i>
Student matriculated for UENG. Student admitted, but not matriculated for UGRD.	UENG (Program) <i>Primacy was not applied because there was only one career at the program level.</i>
Student matriculated for UENG. Student also matriculated for UGRD.	UGRD (Program) <i>Primacy was applied at the program level.</i>
Student enrolled for UENG. Student matriculated, but not enrolled for UGRD.	UENG (Term) <i>Primacy was not applied because there was only one career at the term level.</i>

Viewing Term Build Details

Access the FA Term Build Statistics page (click the Build Info link on the FA Term page).

FA Term Build Statistics				
Nicole Hyde		ID:	FA0612	
Academic Institution:		PeopleSoft University	Term:	2005 Spr
Effective Date:	06/15/2004	Seq:	1	
User:	SAMPLE			
Process Instance:				
Creation Date:	06/15/2004			
Source:	Term			
Online/Batch:	Online Execution			
Driver Option:	Update Only			

FA Term Build Statistics page

Source

Displays the source of the build.

Admissions: The student is not in the Student Records system but has either applied for admission or has been accepted for admission. In either case, the student is not yet matriculated and terms are built in projection.

Manual: Data for the financial aid term was entered manually, and is not based on data from Student Records or Recruiting and Admissions.

No Data: The term contained old projections data, and all statistical values for that term are set to zero to prevent old projected data from counting in the cumulative values for a given student.

For example, you might receive this source value for terms in a current aid year that are still projected when you build projected terms for the next aid year. Another example is when a term built with a source value of *Program* for an aid year that has passed that is rebuilt when you build terms for the subsequent aid year in projections.

If you want to maintain past projected term data, you have to go into the past aid year and rebuild the aid year in projections. When you process past aid years, current and future aid years are not set to *No Data*.

Program: The student exists in the Student Records system but has not enrolled in courses for that term. The student can either have a program defined without being term activated or the student has a program defined and could be term activated but not yet enrolled. The financial aid term is built in projection.

Term: The statistics are from enrollment data. The student has enrolled or changes to enrollment have occurred, including a drop of all courses for the term.

Online/Batch

Indicates whether the build was performed manually, online, or in batch. Values are *Batch* and *Online Execution*. If the field is blank, the build was performed manually.

Driver Option

Populated for students whose financial aid terms are built in batch or online. Identifies whether the FA Term driver record used to run the background process builds:

- Only those terms that have enrollment data or changes to enrollment data (*Updates Only*).
- Terms using projected data as well as enrollment data (*Updates and Projections*).

For an online build process to have a driver option of *Updates and Projections*, you must select the Projections check box on the FA Term page.

Overriding Census Date Locking

Access the FA Term Census Date Locking page (click the Census Date link on the FA Term page).

FA Term Census Date Locking

Nicole Hyde

Academic Institution: PeopleSoft University

Effective Date: 06/15/2004

Census Date Used:

Lock After Census Date: ☒

Override Census Date Locking ☐

Lock Override User:

Lock Override Date:

ID: FA0612

Term: 2005 Spr

Seq: 1

Financial Aid Census Date:

Academic Census Date: 02/21/2005

FA Taken:

18.000

FATaken Unlock:

18.000

FA Load:

Full-Time

Budget Required:

Assgn Bdgt

FA Term Census Date Locking page

Census Date Used

Displays the census date used to determine when the FA Load, FA Taken, and Budget Required fields are locked. The date displayed indicates which census date takes precedence if the term has an academic census date and a financial aid census date. When both census dates exist, the financial aid census date always takes precedence.

Financial Aid Census Date

Displays the financial aid census date defined by your institution for each term on the FA Term Setup page. After the financial aid census date for a term has passed, that term can no longer be built as a projection and any existing projections for that term are rebuilt and the new effective-dated row has a status of inactive. (Remember that a new effective-dated row is inserted if a change occurs in one of the audited fields when you rebuild the financial aid term.) The source for the new effective-dated row is No Data, all term statistics are set to zero, and the Budget Required field is changed to *No Assign*. If the student has a budget, you may need to reevaluate the student's budget. If the student has financial aid awards, you may need to cancel these awards because the student is not enrolled.

If the student's terms have been built with enrollment data (not in projection), on and after this date, the FA Load, FA Taken, and Budget Required fields are locked. If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in Census Date Used field.

Important! If you want to use the academic census date to lock the FA Taken, FA Loan, and Budget Required fields, then you must delete the financial aid census date on the FA Term Setup page. Remember that this affects all students for the term in the given career.

Lock After Census Date Indicates whether the Lock check box is selected on the FA Term Setup page. If selected, the FA Taken and FA Load field values are locked with the data as of the census date, and the Budget Required field is set to *No Assign*.

Academic Census Date Displays the census date defined by your institution for each session in a term in Student Records. If a term has multiple sessions, you can define a default session for the term in Student Records. If a default session exists, the academic census date is the census date of the default session. If no default session exists, the system uses the census date of the regular academic session as the academic census date.

On and after the academic census date, the FA Load and FA Taken fields are locked and the Budget Required field is changed to *No Assign*. If an academic census date and a financial aid census date exist, the financial aid census date is used to determine the locking of these fields and is displayed in Census Date Used field.

Override Census Date Locking

Select to override the census date locked fields for the term for this student. To use a census date override, the current date must be after the date in Census Date Used. Using an override enables you to update the FA Taken, FA Load, and Budget Required fields when you rebuild the FA Term. After selecting this check box you must close the page and click Save. Then click the Build button to rebuild the FA Term for the student online.

You can override the census date lock only for an individual student, not as a background process. After you have selected this check box and saved the page, you cannot clear it.

Lock Override User

Indicates the user ID of the person who selected the Override Census Date Locking check box. This field is only populated if the census date has passed and the Override Census Date Locking check box is selected.

Lock Override Date	Displays a date/time stamp inserted by the system when the Override Census Date Locking check box is selected. This field is only populated if the census date has passed and the Override Census Date Locking check box is selected.
FA Taken	Displays the student's financial aid units taken as of the census date. If the Lock After Census Date check box is selected, this field displays the locked value.
FA Taken Unlock	Displays the value for the actual financial aid units after the census date. You must rebuild the FA Term to have the most current units displayed in this field. This allows you to see the effect on the financial aid units taken if you select the Override Census Date Locking check box.
FA Load	Displays the student's financial aid load as of the census date.
Budget Required	Displays the value of the Budget Required field on the Financial Aid Info page in this component. The student's value determines his or her stage in the budget build process. If you use census date locking, after the census date passes the value in this field, it becomes <i>No Assign</i> .

Viewing Academic Advisor Information

Access the FA Term Academic Advisor Information page (click the Advisor link on the FA Term page).

FA Term Academic Advisor Information	
Nicole Hyde	ID: FA0612
Academic Institution: PeopleSoft University	Term: 2005 Spr
Effective Date: 06/15/2004	Seq: 1
Academic Advisor: <input type="text"/>	
Advisor Role: <input type="text"/>	
Committee: <input type="text"/>	

FA Term Academic Advisor Information page

Note. This page displays data from PS_STDNT_ADVR_HIST. This data is maintained and entered on the Student Advisor page (Manage Student Records, Track Student Careers, Use, Student Advisor).

Academic Advisor	Displays the ID of the academic advisor assigned to this student.
Advisor Role	Displays the role of this student advisor.
Committee	Displays the committee on which this advisor serves.

Viewing Campus Information

Access the FA Term Campus Information page (click the Campus Info link on the FA Term page).

FA Term Campus Information

Nicole Hyde

ID:

FA0612

Academic Institution:

PeopleSoft University

Term:

2005 Spr

Effective Date:

06/15/2004

Seq:

1

FA Campus:

MAIN

Registrar Campus:

MAIN

Advisement Campus:

MAIN

FA Term Campus Information page

- FA Campus (financial aid campus)

Enter the physical location where the student receives financial aid services.
- Registrar Campus

Enter the physical location of the registrar responsible for the student.
- Advisement Campus

Enter the physical location where the student goes for advising services.

Viewing Academic Level and Load Information

Access the Acad Level page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level).

FA Term	Acad Level	Statistics	Financial Aid Info	Records/Term Info	Withdrawal Info
Student Test1			FAASG001		
Term Information Find View All First 1 of 4 Last					
Institution: PeopleSoft University			Term: 2008 Spr Semester		
Student Data Find View All First 1 of 1 Last					
Effective Date: 05/03/2007		Seq: 1	Status: Active		
Academic Career: Undergraduate		Primary Program: Fine Arts Undergraduate			
Academic Plan: Undeclared Undergraduate		Academic Sub-Plan:			
Ovrd			Calculated Values		
<input type="checkbox"/> Form of Study:	Enrollment		Course Load Pct: 100.00		
<input type="checkbox"/> Approved Academic Load:	Full-Time		Full-Time		
<input type="checkbox"/> Academic Load:	F	Full-Time	Full-Time		
<input type="checkbox"/> Financial Aid Load:	F	Full-Time	Full-Time		
<input checked="" type="checkbox"/> Academic Level	<input checked="" type="checkbox"/> Projected:	10	Freshman	Sophomore	
	Start:	10	Freshman	Freshman	
	End:	10	Freshman	Sophomore	
View HERA Academic Level					

Acad Level page

You can override the values in the Form of Study, Approved Academic Load, Academic Load, Financial Aid Load, Academic Level - Projected, Academic Level - Start, and Academic Level - End fields by selecting a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field on the FA Term page.

Form of Study

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system populates this field by default with the Student Records value. Values include: *Detached*, *Enrollment*, *Abroad*, and *Candidacy*.

Approved Academic Load

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system populates this field by default with the load value that exists for the primary academic career. Values are *Full-Time* and *Part-Time*.

Academic Load

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The number of units the student is enrolled in determines the student's academic load. The number of units, which is the sum of the Academic Progress Units value (from the Catalog Data page) for each class the student is enrolled in, is compared against the level/load rules to determine the appropriate academic load. For this calculation, the system uses the number of units defined for the student's courses according to Student Records. The same courses may count for a different number of financial aid eligible units. Values are: *Full-Time*, *Half-Time*, *Less 1/2*, *No Units*, *Part-Time*, and *3/4 Time*.

Financial Aid Load To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system normally derives the value by comparing the calculated unit cumulative with the unit conversion. The system compares the number of units, which is the sum of the Financial Aid Progress Units value (from the Catalog Data page) for each class the student is enrolled in, against the level/load rules to determine the appropriate load value. For this calculation, the system uses the number of financial aid eligible units defined for the student's courses according to Student Records. The same courses may count for a different number of academic units. Values are: *Full-Time, Half-Time, Less 1/2, No Units*, and *Three Qtrs*.

Note. The values in the three academic level fields are based on level/load rules associated with the student's primary academic program. Only those academic levels that are associated with the student's primary academic program academic level rule are available. Academic level values are shipped with the system as translate values. These translate values can be modified.

Academic Level - Projected To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This field displays the projected academic level for the student at the end of the term, based on Student Records data. The projected level is based on the student completing all courses in prior terms, plus the enrollment for the current term. For example, the student has passed thirty units in previous terms and is currently enrolled in twelve units. The system uses the sum of these units, forty-two, to determine the student's academic level using level/load rules.

Academic Level - Start To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This value represents the total number of units the student has passed in all previous terms. The system uses the sum to determine the academic level using load/level rules.

Academic Level - End To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The student's academic level at the end of the term equals the cumulative passed units from previous terms, plus the number of units passed for the current term. The system uses the sum to determine the academic level using load/level rules. The Projected Academic Level always matches the End Academic Level when term progression is used in the Level/Load rule applied to the student.

Course Load Pct (course load percentage) The course load percentage provides an alternative way to define full-time and less than full-time students based on percentages. The value in this field is derived from level/load rules. When you invoke the FA Term process, the system calculates the course load percentage for each student.

View HERA Academic Level Click the View HERA Academic Level link to access the HERA Academic Level page. This link displays only when the HERA academic level setup has been provided.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Setting Up Catalog and Schedule Options

Viewing HERA Academic Levels

Access the HERA Academic Level page (click the View HERA Academic Level link on the Acad Level page).

Note. Documentation about the HERA Academic Level page is located in the Processing ACG and SMART Grants chapter.

See: *Processing ACG and SMART Grants*, Maintaining HERA Academic Level Values

Viewing Academic Statistics

Access the Statistics page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics).

FA Term	Acad Level	Statistics	Financial Aid Info	Records/Term Info	Withdrawal Info
Joon Song		FA0601			
Term Information Find View All First 1 of 21 Last					
Institution: PeopleSoft University		Term: 2008 Sum		Semester:	
Student Data Find View All First 1 of 1 Last					
Effective Date: 01/16/2007		Seq: 1		Status: Active	
Academic Career: Graduate		Primary Program: Graduate Fine Arts Programs			
Academic Plan: Art History (MA)		Academic Sub-Plan:			
Ovrd	Term	Calc Vals	Ovrd	Cumulative	Calc Vals
GPA:	<input type="checkbox"/> 0.000	0.000	<input type="checkbox"/>	0.750	0.750
Taken:	<input type="checkbox"/> 18.000	18.000	<input type="checkbox"/>	332.000	332.000
Remote:	<input type="checkbox"/> 0.000				
Total:	18.000				
Passed:	<input type="checkbox"/> 0.000	0.000	<input type="checkbox"/>	170.000	170.000
Residency:	<input type="checkbox"/> 1.000			21.000	
		Residence Terms:		<input type="checkbox"/> 0.000	
<div> <input type="checkbox"/> Cum Reset <input type="checkbox"/> GPA Calc <input type="checkbox"/> Warning </div>					
Session Detail					
Anticipated: 18.000					
In Progress:					
Completed:					
Current:					
Current Load: No Units					
Class Detail					

Statistics page

If students have not applied for financial aid in contiguous aid years but have been enrolled in terms in which they did not apply for aid, the system recalculates cumulative statistics (GPA, UNITS TAKEN, UNITS PASSED) from their enrollment data for the first term of the noncontiguous aid year. The system recognizes students as financial aid applicants for an aid year if they are aid year activated. This resolves inaccuracies in the cumulative statistics when students may be continuously enrolled at the school but have not applied for financial aid for all aid years. If no enrollment information exists for the students in terms in which they have not applied for aid, the cumulative statistics calculation remains unchanged.

Student Data

You can override the values in the GPA - Term, GPA - Cumulative, Taken - Term, Taken - Cumulative, Passed - Term, and Passed - Cumulative fields by entering a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you want to override the fields only until a certain date within the term, use the Override Expiration Date field on the FA Term page.

GPA - Term	Displays the student's grade point average (GPA) for the term you are viewing. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
GPA - Cumulative	Displays the student's cumulative GPA, including this term. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Taken - Term	Displays the number of units taken this term. The value of this field determines the FA Load on the FA Term Census Date Locking page. The Tuition Calculation routine also uses this number of units during the Student Budget Assignment process. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Taken - Cumulative	Displays the total units a student has taken, including this term. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Remote	Displays units a student is taking concurrently at another institution that are part of a student's unit load for the term. This situation can occur if you have a multi-institution system, and the student takes courses at another institution within the system. Remote units indicate that a student is enrolled at two different campuses.
Total	Displays the total number of units (Taken - Term units plus Remote units) the student is taking this term.
Passed - Term	Indicates the number of units the student completed with a passing grade for the term. The system uses this value to determine the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Passed - Cumulative	Indicates the cumulative units the student has completed with a passing grade, including units passed this term. This value is used in determining the student's projected, start, and end academic levels (displayed on the Acad Level page). The system also uses this value to update the NSLDS loan year. To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column.
Residency - Term	Indicates the number of units a student has completed in residency at your institution this term.

Residency - Cumulative	Indicates the total number of units a student has completed in residency at your institution.
Cum Reset (cumulative reset)	If selected, Student Records has reset all the student's cumulative fields to zero for this term. This is usually done to handle academic forgiveness, transfer credits, or consecutive academic careers. This field is informational only and has no effect on Student Records or Financial Aid. However, you may want to contact the student records administrators to determine why the student's cumulative fields have been reset.
GPA Calc (grade point average calculation)	Automatically selected if the FA term build process failed to calculate a GPA for the student. This can happen when a student is enrolled in multiple careers that do not have the same grading scheme—such as concurrent enrollment in undergraduate and graduate careers in a given term. This field is for informational purposes only. However, you may want to determine why the build process was unable to calculate a GPA for the student.
<hr/> Warning! The system selects this check box if either the Cum Reset or GPA Calc check box is selected. This field serves as a flag that your institution can track. <hr/>	
Transfer Credit	The system displays this link only when you have entered transfer credits for the student. Click to access the FA Term Transfer Credits page and view information about the number of transfer credits that a student has.
Other Units	The system displays this link only when the student has more than one academic career associated with more than one financial aid career type. Click to access the FA Term Other Units page and view term statistics for a student's other academic career.
Class Detail	Click to access the FA Term Class Detail page and view a detailed picture of the student's enrollment.

Session Detail

Track a student's progress using units during the session and term. These fields do not affect the calculation of GPA and NSLDS loan year directly, but are accounted for in Taken - Term, Taken - Cumulative, Passed - Term, and Passed - Cumulative fields.

Anticipated	Displays the number of units the student is enrolled in for classes whose start date is after the effective date.
In Progress	Displays the number of units for classes the student is enrolled in and the effective date is between the class start date and end date.
Completed	Displays the number of units the student has completed as of the effective date. This field does not track passed courses; it counts the units of all classes whose end dates are earlier than the effective date.

Current	Displays the total number of units the student has completed and is currently enrolled in for the term (sum of in progress and completed units). This allows you to track the total number of units taken for the term regardless of the number of sessions taken.
Current Load	Displays the student's academic load for the term, based on the number of units in the Current field.

Viewing Transfer Credit Information

Access the FA Term Transfer Credits page (click the Transfer Credit link on the Statistics page).

FA Term Transfer Credits			
John Suazo		ID:	FA0600
Academic Institution: PeopleSoft University		Term:	2005 Spr
Effective Date:	06/15/2004	Seq:	1
Term Values		Totals	
Transfer:	8.000	Transfer:	35.000
TrnPasGPA:	3.600	Test:	16.000
TrnPasNGPA:	1.000	Other:	17.000
Test:	4.000	Total TC Adjust:	2.000
Other:	4.000		

FA Term Transfer Credits page

Term Values

Transfer	Displays the number of units the student received transfer credit for this term.
TrnPasGPA (transfer passed for GPA)	Displays the number of passed transfer credit units that count towards the student's GPA for this term.
TrnPasNGPA (transfer passed not for GPA)	Displays the number of passed transfer credit units that do not count towards the student's GPA for this term.
Test	Displays the number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests for this term.
Other	Displays the number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program for this term.

Totals

Transfer	Displays the total number of units from transfer credit the student has.
Test	Displays the total number of units the student has earned by taking tests such as the SAT II or Advanced Placement tests.
Other	Displays the total number of units the student has earned from other sources, such as credits for work experience or credits from the ROTC program.
Total TC Adjust (total transfer credit adjustment)	Displays the total number of units that the student has earned but does not receive credit for in the system. For example, if your institution has a limit of 100 transfer units, and the student has earned 120 transfer units, this field displays 20 for the 20 units the student does not receive credit for in the system.

Transfer Credit and Financial Aid Term Build

A transfer student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record depend on the data source and whether the student's transfer credits have been posted in Student Records.

If a transfer student's financial aid term is built with a source of *Admissions*, then the student's academic level information and NSLDS loan year are based on the year (level) at which the student is admitted. The information on the Statistics page, however, reflects only the projected term enrollment information. Only the units that the student is projected to enroll in for the term are used to determine the student's units taken for the term and cumulative units taken.

If the source is *Program* or *Term*, then the student's financial aid term information depends on whether the student's transfer credits have been posted in Student Records. If the student's transfer credits have been posted, then the student's academic level information is determined using the number of transfer units the student has and your institution's level/load rules. The student's NSLDS loan year, in turn, is based on the student's calculated academic level. The cumulative values on the Statistics page include the transfer credits. In other words, the build process derives the student's financial aid term data using the transfer credit as if it were units taken in the past at your institution.

In contrast, if the source is *Program* or *Term* and transfer credit has not been posted, the student's NSLDS loan year, academic level information, GPA, and cumulative units (taken and passed) on the student's financial aid term record do not reflect the transfer credits. Consequently, the student is built as a freshman for the starting academic level and NSLDS loan year (because the NSLDS loan year is calculated from the academic level). The values on the Statistics page include information for the current term only.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Processing Transfer Credit"

Viewing Term Statistics for a Student's Other Career

Access the FA Term Other Units page (click the Other Units link on the Statistics page).

FA Term Other Units			
John Suazo		ID:	FA0600
Academic Institution: PeopleSoft University		Term:	2005 Spr
Effective Date:	06/15/2004	Seq:	1
Other FA Taken:	3.000		
Other FA Passd:	3.000		
Other Grade Pts:	2.000		
Other Taken GPA:	2.000		

FA Term Other Units page

Students have another academic career when they have more than one academic career associated with more than one financial aid career type. The term statistics for the academic career with the lower primacy number (or higher priority) is displayed on the Statistics page. The term statistics for the career with the higher primacy number (or lower priority) appears on this page. You can use this information to adjust a student's award package manually based on these units taken.

Note. The data on the FA Term Other Units page does not carry forward to other terms unless multiple financial aid career types for other terms exist

Other FA Taken and Other FA Passd (other FA passed)	Displays units taken and units passed for the other academic career for the term.
Other Grade Pts (other grade points)	Displays grade points for the other academic career for the term.
Other Taken GPA	Displays the units considered toward the GPA for the other academic career for the term.

Viewing a List of the Student's Classes

Access the FA Term Class Detail page (click the Class Detail link on the Statistics page).

FA Term Class Detail

Joon Song

ID: FA0601**Academic Institution:** PeopleSoft University**Term:** 2008 Sum**Effective Date:** 01/16/2007 **Seq:** 1**Enrolled in OEE Courses:** N

<u>Class Nbr</u>	<u>Description</u>	<u>FA Taken</u>	<u>Start Date</u>	<u>End Date</u>	<u>OEE</u>
1020	Introduction to Sociology	18.000	05/23/2008	08/14/2008	<input type="checkbox"/>

FA Term Class Detail page

Note. The data appearing on this page changes depending on the effective-dated row and enrollment changes from Student Records.

Enrolled in OEE Courses (enrolled in open entry/exit courses) Indicates whether the student is enrolled in one or more Open Entry/Open Exit sessions.

Class Nbr (class number) Displays the class's unique identifier, assigned in Student Records.

FA Taken Displays the number of financial aid eligible units the class is worth.

Start Date and **End Date** Displays the start and end dates for the class.

OEE (open entry/exit) Indicates whether the class is an Open Entry/Open Exit session. This information comes from Student Records and determines the value of the Enrolled in OEE Courses field.

Viewing Loan, Graduation, and Budget Information

Access the Financial Aid Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info).

FA Term	Acad Level	Statistics	Financial Aid Info	Records/Term Info	Withdrawal Info
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Joon Song FA0601

Term Information: Find | View All First 1 of 21 Last

Institution: PeopleSoft University **Term:** 2008 Sum Semester

Student Data: Find | View All First 1 of 1 Last

Effective Date: 01/16/2007 **Seq:** 1 **Status:** Active

Academic Career: Graduate **Primary Program:** Graduate Fine Arts Programs

Academic Plan: Art History (MA) **Academic Sub-Plan:**

Overridden (Ovrd):

☐ **NSLDS Loan Year:** Graduate/Professional **Calculated Values:** Graduate/Professional

☐ **Direct Lending Year:** First Yr, Grad/Prof **Calculated Values:** First Yr, Grad/Prof

Confer Date: 08/28/2008

☐ **Expected Grad Term:**

☐ **Expected Grad Date:**

☐ **Academic Standing:**

☐ **FA Standing:**

Budget Required: Assign Bdgt

[Field Audits](#)

Financial Aid Info page

You can override the values in the NSLDS Loan Year, Direct Lending Year, Expected Grad Term, Expected Grad Date, Academic Standing, and FA Standing fields by entering a new value in each field that differs from the value in the Calculated Values column. If you override the value, the Financial Aid Build routine does not recalculate the field for the associated term. You can tell if a value has been overridden by comparing the value against the calculated value for the field. If you need only to override the fields until a certain date within the term, use the Override Expiration Date field on the FA Term page.

NSLDS Loan Year

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system calculates the student's NSLDS loan year by comparing the student's cumulative units passed against the Academic Level table. It uses this value in awarding to determine level limit rules attached to a specific financial aid item type. The system also uses this field in the Loan Process routine to determine the student's loan level aggregate. The NSLDS loan year selections are translate values based on the financial aid level. Values include: *1st Year - Never Attended*, *1st Year - Previously Attended*, *1st Year Graduate*, *2nd Year*, *2nd Year Graduate*, *3rd Year*, *3rd Year Graduate*, *4th Year*, *4th or more Graduate*, *5th Year+* and *Graduate/Professional*.

Direct Lending Year

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system determines the direct lending year the same way it determines the NSLDS loan year. When the system creates direct lending origination files, it populates the Student's College Grade Level with the information from this field. Correct the value in this field as required by direct lending reporting requirements. Values include: *Fifth Year+ Undergrad* (fifth year plus undergraduate), *First Year, never attended*, *First Year, previously atnd* (first year, previously attended), *First Yr, Grad/Prof* (first year graduate/professional), *Fourth Year*, *Fourth Yr+*, *Grad/Prof* (fourth year plus, graduate professional), *Third Year* or *Third Yr, Grad/Prof*.

Confer Date

Enter or view the confer date of the student's degree if the student graduates in the displayed term. This date corresponds with the term end date found on the Term Table.

Expected Grad Term
(expected graduation term)

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. The system uses this value for loan processing. If available, the system uses the Student Records value or the PeopleSoft Enterprise Recruiting and Admissions value.

When you build terms in projection, the build process does not build terms after the expected term of graduation, unless the student is going into another career after graduation.

The student's expected graduation term is a loan validation field edit. This means that if the expected graduation date has passed, the Loan Validation routine prevents loan origination. If a value exists for this field, it automatically appears when you create the student's loan origination application. The field can be updated online in the loan origination pages when processing the student's loan application.

Expected Grad Date
(expected graduation date)

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. Enter or view the date the student is expected to graduate. The system uses the expected graduation date for loan processing. If available, the system uses the Student Records value. The loan origination process projects a graduation date if the field is blank.

The Loan Validation Field Edit routine checks for this value. If a value exists for this field, it automatically appears in the Program Completion Dt (program completion date) field on the Loan Origination 2 page when you create the student's loan origination application. You can update the field online in the loan origination pages when processing the student's loan application.

In CommonLine loan processing, it is important for the expected grad date not to occur before the end of the student's loan period. The loan is rejected by the loan servicer as a result. A loan validation edit is provided to identify invalid graduation dates.

Note. It is important that the academic departments, the financial aid office, other administrative departments, and the student agree on the student's graduation term and date. Errors in these dates can have serious consequences for a student's loan eligibility and repayment periods.

Academic Standing

To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. This value is based on meeting your institution's academic progress guidelines. You can create these values on the Academic Standing Table page in Student Records and set them up as action codes. You can create values for dismissed, good standing, probation, or warning statuses, and you can create multiple codes for the same status. For example, a student could receive two warnings (WRN2) before being placed on probation.

The financial aid term build process populates this field only if academic standing data exists for the student in Student Records.

This field is not used for financial aid processing, but you can use it in formulas or equations to select students.

FA Standing (financial aid standing) To activate the override check box, modify the field value so that it differs from the value in the Calculated Values column. You create and maintain action codes on the Academic Standing Table page in Student Records. Your financial aid office can assign a code for the selected term to establish a student's financial aid status for a locally defined business process. This field is set manually and is not used by delivered financial aid processes.

Budget Required Indicates whether a student has an assigned budget or needs a budget posted. The value in this field determines whether the student is evaluated during the Budget Assignment process. Values include:

Assgn Bdgt (assign budget): The student should be selected during the Budget Assignment process. Whenever you build or rebuild a term, the field is automatically updated with this value.

In Prgres (in progress): The assignment of a budget is currently in progress for this student. The field is automatically updated to this value when a student has been selected for the budget assignment process.

Error: An error occurred during the Budget Assignment process.

No Assign: The system does not select the student during the Budget Assignment process. The field is automatically updated to this value when the student's budget is posted by the Student Budget Assign – Move (FAPBDGTM) process. The census date locking functionality also causes this value to be assigned after the census date has passed and the lock has been invoked.

Field Audits Click to access the FA Term Field Audits page and monitor changes in a student's financial aid term information from the previous effective-dated row. You must select the Audit FA Term Build check box on the Financial Aid Defaults page to view changes to the student's financial aid term on the FA Term Field Audits page. If you do not select this check box, the system does not record changes in the student's record to the audit table; a new effective-dated row is still built every time that a change occurs in one of the audited fields.

See Also

PeopleSoft Enterprise Student Records 9.0 PeopleBook, "Tracking Student Data," Tracking Academic Standing

Viewing Changes in a Student's FA Term Information

Access the FA Term Field Audits page (click the Field Audits link on the Financial Aid Info page).

FA Term Field Audits

Lamii Vigor

ID: FA0711**Academic Institution:** PeopleSoft University**Term:** 2005 Spr**Effective Date:** 09/21/2004 **Seq:** 1

<u>Field Name</u>	<u>Old Value</u>	<u>New Value</u>	<u>User ID</u>	<u>Online/Batch</u>	<u>Process Instance</u>
ACADEMIC_LOAD	F	T	PS	Online	
ADMIT_TERM	0360		PS	Online	
CAMPUS	MAIN	WALCR	PS	Online	
COURSE_LD_PCT	00000100	00000075	PS	Online	
CUM_RESIDENT_TERMS	00000007	00000009	PS	Online	
FA_LOAD	F	T	PS	Online	
FA_UNIT_ANTIC	00000016	00000011	PS	Online	
TOT_PASSD_FA	00000000	00000024	PS	Online	
TOT_TAKEN_FA	00000096	00000115	PS	Online	
UNT_TAKEN_FA	00000016	00000011	PS	Online	

FA Term Field Audits page

Monitor changes made by the FA Term Build background process or by the FA Term Online Build process. The Online Build process is performed when you click the Build button on the FA Term page.

If a change occurs in one of the following fields, the FA Term Build background process or the FA Term Online Build process creates a new effective-dated row and enters the old and new value on the FA Term Field Audits page. You can create your own reports using the audit data provided on the page. The audited fields are:

Audit Fields		
ACAD_CAREER	CUR_RESIDENT_TERMS	SFA_ASG_WI_CUM_BOT
ACAD_LEVEL_BOT	EXP_GRAD_TERM	SFA_ASG_WI_CUM_EOT
ACAD_LEVEL_EOT	FA_LOAD	SFA_ASG_UNITS_BOT
ACAD_LEVEL_PROJ	FA_LOAD_CURRENT	SFA_ASG_UNITS_EOT
ACAD_PLAN	FA_NUMBER_OF_WEEKS	SFA_ASG_WI_TCR
ACAD_PLAN_TYPE	FA_REBUILD_DT	SFA_ASG_WI_TRM
ACAD_PROG_PRIMARY	FA_UNIT_ANTIC	STUDY_AGREEMENT
ACAD_SUB_PLAN	FA_UNIT_COMPLETED	TERM_SRC

Audit Fields		
ACADEMIC_LOAD	FA_UNIT_CURRENT	TOT_PASSD_FA
ADMIT_TERM	FA_UNIT_IN_PROG	TOT_TAKEN_FA
CAMPUS	FORM_OF_STUDY	UNT_PASSD_FA
COURSE_LD_PCT	LS_GPA	UNT_TAKEN_FA
CUM_GPA	SFA_ASG_AC_LVL_BOT	WEEKS_OF_INSTRUCT
CUM_RESIDENT_TERMS	SFA_ASG_AC_LVL_EOT	WITHDRAW_CODE

Field Name	Displays the name of the field with the changed value.
Old Value	Displays the value of the field before the change, listed on the previous effective-dated row.
New Value	Displays the value of the field after the change, listed on the current effective-dated row.
User ID	Displays the ID of the user who processed the change.
Online/Batch	Indicates whether the change was made in batch or online.
Process Instance	Displays the process instance for the background process that changed the field. If the change was made online, this field is blank.

Viewing Student Records Term Information

Access the Records/Term Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Records/Term Info).

FA Term	Acad Level	Statistics	Financial Aid Info	Records/Term Info	Withdrawal Info
Nicole Hyde			FA0612		
Term Information Find View All First 1 of 14 Last					
Institution: PeopleSoft University			Term: 2008 Spr Semester		
Student Data Find View All First 1 of 1 Last					
Effective Date: 01/16/2007		Seq: 1	Status: Active		
Academic Career: Undergraduate		Primary Program: Liberal Arts Undergraduate			
Academic Plan: Undeclared Undergraduate		Academic Sub-Plan:			
Weeks of Instruction: 15		Academic Advisor Group: Lib Arts			
FA Number of Weeks: 0		Admit Term: 0360 1999 Sumr			
Start Date: 01/24/2008		Bill Units: <input type="checkbox"/> Override Billing Units			
End Date: 05/07/2008		Canadian Cost Code:			
Study Agreement:					
External Org ID:					
Country:					

Records/Term Info page

This page is intended for collecting study abroad or institutional visit information from Student Records and entering Canadian cost code information. Information on this page can be changed for financial aid purposes without any effect on Student Records data in your system.

Weeks of Instruction

A calculated value built when the term is built with a source of Term. The build process adds the number of weeks of the different session start and end dates for all classes the student is enrolled (taking into consideration any overlap in enrollment). For Open Entry/Open Exit courses, where the start and end dates for the student's classes are expected to be different, the start and end dates of these courses are used in place of the session dates.

If the term is built with projected data, then the build process populates this field with data from the FA Term Setup page. If multiple sessions exist for a term, the build process looks for a default session. If a default session is defined, the build process uses the weeks of instruction from the default session. If no default session exists, the build process uses the weeks of instruction from the regular academic session.

FA Number of Weeks

Displays information from the Cost Code Setup page that is used for Canadian loans.

Start Date and End Date

Displays the beginning date and ending date of the term. If the student is enrolled in a single session, the start date is the term start date. If the student is enrolled in multiple sessions, the start date is the earliest session start date of the classes the student is enrolled in. The end date comes from the Term Table.

Study Agreement

This value is derived from Student Records. The values in this field may include Study Abroad programs or programs sponsored by other external organizations.

External Org ID

(external organization ID)

This value is derived from Student Records. Select the appropriate ID to associate with the study agreement.

Country	This value is derived from Student Records. Select the appropriate country to associate with the study agreement and external organization.
Academic Advisor Group	This value is derived from the Academic Group field in the Academic Program Table in Student Records. It indicates the school within the institution. Examples of an academic group are College of Fine Arts, School of Medicine, or Continuing Education. The build process inserts a value into this field only if a value exists in the Academic Group field; otherwise, it leaves this field blank.
Admit Term	The term the student was admitted to the primary program. If the student has switched primary programs since he or she was admitted, then the admit term displays the term that the student switched programs.
Bill Units (billing units)	This value is derived from Student Financials. You can override the Billing process by selecting the Override Billing Units check box. You can then enter the number of billing units you want to use for the student. This field is for informational purposes only.
Override Billing Units	Select this check box to override the Billing process. After you select this check box, you can enter a new value in the Bill Units field.
Canadian Cost Code	(CAN) Used by Canadian institutions only. The FA Term process populates this value, based on the number of weeks of financial aid and the student's career, program, and year in school. You set up your institution's cost codes on the Cost Code Setup page. Canadian institutions use cost codes to report financial aid calendars, length of financial aid award periods, and cost of attendance information to the Canada Student Loan program.

Viewing Withdrawal Information

Access the Withdrawal Info page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Withdrawal Information, Withdrawal Info).

FA Term	Acad Level	Statistics	Financial Aid Info	Records/Term Info	Withdrawal Info
Nicole Hyde			FA0612		
Term Information Find View All First 1 of 14 Last					
Institution: PeopleSoft University			Term: 2008 Spr Semester		
Student Data Find View All First 1 of 1 Last					
Effective Date: 01/16/2007		Seq: 1	Status: Active		
Academic Career: Undergraduate			Primary Program: Liberal Arts Undergraduate		
Academic Plan: Undeclared Undergraduate			Academic Sub-Plan:		
Withdrawal/Cancel:					
Withdrawal/Cancel Reason:					
Withdrawal/Cancel Date:			Refund Scheme:		
Last Date of Attendance:			Refund Classification:		
Refund Percentage:			Refund SetID:		
Tuition Calc Date Time:			Service Indicator Code:		
Tuition Group:			Service Indicator Date Time:		

Withdrawal Info page

Student Records processes student withdrawals, collecting information about the type of withdrawal, the reason for the withdrawal, and the last date the student attended class. Student Financials uses this information to calculate whether the student should receive a refund and posts these calculations. This page displays information from Student Records and Student Financials that may affect financial aid processing, such as return of Title IV funds.

Refund Percentage	Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. This value is posted if a tuition calculation has occurred. The refund percentage is based upon the date of the student's withdrawal.
Refund Scheme	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. The refund scheme is based upon the adjustment used.
Refund Classification	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.
Refund SetID	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account.
Service Indicator Code	Tuition calculation only posts this value if a student receives federal financial aid and financial aid has been posted to the student's account. Shows a service indicator set by Student Financials to state the need for financial aid to adjust the student's aid and release a hold.
Service Indicator Date Time	Tuition calculation only posts if a student receives federal financial aid and financial aid has been posted to the student's account. The date and time the service indicator was set.

Building Financial Aid Terms Manually

After you have completed the setup steps, you can choose to run the FA Term build process manually. Go to the FA Term page and click the Build button.

Building Financial Aid Terms in Batch

This section provides an overview of building financial aid terms in batch and discusses how to:

- Create FA Term driver records.
- Create financial aid terms in batch.

Understanding Building Financial Aid Terms in Batch

Running the batch financial aid term build process is a two-step process. You must:

- Create an FA Term driver record to identify the students for which to build financial aid terms. This process selects students using institution, aid year, and career as criteria and inserts the IDs of these students into a worktable.
- After students have been selected, you run the FA Term Build process (FAPTRMU1) to create financial aid terms for the students in the worktable. You must remember to enter the same institution and aid year on this page as you did for the FA Term driver record.

Pages Used to Build Financial Aid Terms in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create FA Term Driver Records	RUNCTL_FAPTRMU1SQR	Financial Aid, Financial Aid Term, Create FA Term Driver Recs, Create FA Term Driver Records	Create FA Term driver records for the batch Financial Aid Term build process.
Build FA Terms	RUNCTL_FAPTRMU1CBL	Financial Aid, Financial Aid Term, Build FA Terms in Batch, Build FA Terms	Create Financial Aid Terms in batch.

Creating FA Term Driver Records

Access the Create FA Term Driver Records page (Financial Aid, Financial Aid Term, Create FA Term Driver Recs, Create FA Term Driver Records).

Create FA Term Driver Records

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Process Name: FAPTRMU1

*Academic Institution: PeopleSoft University

*Aid Year: 2008 2007-2008

*Driver Creation Option: Both Updates and Projections

Select Career	Academic Career	Rebuild Projections
<input checked="" type="checkbox"/>	UGRD Undergraduate	<input checked="" type="checkbox"/>

View All First 1 of 1 Last

Create FA Term Driver Records page

The Process Name field displays the name of the process that creates driver records.

Driver Creation Options

Choose the type of terms you want the batch financial aid term build process to build or rebuild.

Both Updates and Projections

Select if you want to build or rebuild terms the student is currently enrolled for as well as terms with projected enrollment information. This means that all terms in the aid year are built (in projection if necessary), regardless if the student has been term activated for the term.

Update Only

Select if you want to build or rebuild only terms for which the student is currently enrolled. This means only those terms for which the student has enrollment data.

Other Page Elements

Academic Career

After you select an academic institution and aid year, a list of careers associated with this aid year on the FA Term Setup page appears in this column. Select the check boxes next to the careers for which you want to run the batch financial aid term build process.

Rebuild Projections

Select to indicate that the financial aid term build process should rebuild projected terms—as well as terms built with enrollment data—using current data. Use this check box to rebuild projections when a change occurs in career or program. You do not have to select this check box to have terms with updates rebuilt, because the build process automatically rebuilds terms with updates. You can choose whether you want to rebuild projections for each career. Even if selected, terms are not built in projection after the census date if you activate the census date lock.

Run

Run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1) when you are ready to create Driver Records.

Creating Financial Aid Terms in Batch

Access the Build FA Terms page (Financial Aid, Financial Aid Term, Build FA Terms in Batch, Build FA Terms).

Build FA Terms

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Process Name: FAPTRMU1 User ID: PS

*Academic Institution:

*Aid Year: Financial Aid Year 2007 - 2008

*Commit Level:

Driver Creation Option:

Print Detailed Messages? ☒

Build FA Terms page

The Academic Institution and Aid Year you select on this page must match the Academic Institution and Aid Year combination on a driver record for which you have run the Create Drivers Recs For FA Trm (create driver records for financial aid term) process (FAPTRMU1).

Commit Level

After you enter an Academic Institution, the default institutional commit level, established on the Financial Aid Defaults page, displays. This is the number of records that are processed before the system issues a commit or a save to the database. If your session ends abnormally, this is the maximum number of records that would be lost. For example, if you set the Commit Level to 10, and an error occurs on the fifteenth student, the system retains the information on the first 10 students.

Driver Creation Option

Used to ensure that the records processed are the same as those selected by the last FA Term driver creation process. This should be set to match the last Create FA Term Driver Records run control setting.

Print Detailed Messages

Select to have the COBOL log contain information on why a student's financial aid term was built or rebuilt.

Run

Run the FA Term Build process (FAPTRMU1) when you are ready to create financial aid terms in batch.

Using the Financial Aid Term Census Report

The Financial Aid Term Census Report identifies those students with a term source of No Data but have award balances for the term, which can be an offered amount, authorized amount, or disbursed amount greater than zero. If you use census dates to lock enrollment data, run the report after running the FA Term build following the census date. Students listed on the report are potential candidates for repackaging and/or reversal of funds.

This section discusses how to identify students not enrolled after census with award balances.

Page Used to Identify Students Not Enrolled After Census with Award Balances

Page Name	Definition Name	Navigation	Usage
Students Not Enrolled After Census with Award Balances	RUNCNTOL_FATRMAWD	Financial Aid, Financial Aid Term, FA Term Census Report, Students Not Enrolled After Census with Award Balances	Identify those students not enrolled for a term after the census data who have an award balance.

Identifying Students Not Enrolled After Census with Award Balances

Access the Students Not Enrolled After Census with Award Balances page (Financial Aid, Financial Aid Term, FA Term Census Report, Students Not Enrolled After Census with Award Balances).

Students Not Enrolled After Census with Award Balances

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Parameters

Academic Institution: PeopleSoft University
Term: Summer Session 2008
Status as of Effective Date:

Students Not Enrolled After Census with Award Balances page

Academic Institution	Academic institution used to generate the report.
Term	Term used to generate the report.
FA Term Effective Status	Effective status for the selected term, which can be <i>Active</i> (default) or <i>Inactive</i> .

Chapter 20

Working with Student Budgets

This chapter provides an overview of student budgets, lists common elements, and discusses how to:

- Assign budgets in batch.
- Assign budgets online.
- Maintain a term budget.
- Review students' budget information.

Understanding Student Budgets

At the beginning of the processing year, you create budgets detailing the cost of attendance (COA) for each term a student is enrolled. The COA is an estimate of a student's educational expenses for the period of enrollment. The budget helps establish a student's need COA minus the student's expected family contribution, which permits the financial aid office to award need-based aid.

This section discusses budget calculations.

Budget Calculations

After you complete budget setup, you calculate student budgets, either in batch, online, for an individual using batch rules, or manually. Use batch background budget assignment when you have large numbers of students to process. You can run this process overnight. For a small number of students, create a budget online using the Create Student Budgets page and use the same rules as batch background budget assignment. To skip budget rules, use the Student Budget Maintenance page to build budgets manually or to override an existing budget.

Common Elements Used in This Chapter

Inst COA (institutional cost of attendance)

Indicates the sum of all budget items assigned to this budget group that have an item class of federal or institutional. The Packaging routine uses this COA during awarding if you designate institutional methodology as the packaging methodology at the financial aid item type level.

Fed COA (federal cost of attendance)	Indicates the sum of all budget items assigned to this budget group that have an item class of federal. The Packaging routine uses this COA during awarding if you designate federal methodology as the packaging methodology at the financial aid item type level.
Pell COA (Pell cost of attendance)	Indicates the sum of Pell amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants.
Pell LTHT COA (Pell less than half-time cost of attendance)	Indicates the sum of Pell less than half-time amounts from the budget items assigned to this budget group. The Packaging routine uses this COA when awarding Pell Grants.
Item Class	Indicates whether you use the budget item for calculating federal or institutional budgets.

Assigning Budgets in Batch

Use batch budget assignment to create student budgets using defined budget assignment rules. Batch budget assignment builds budgets term by term because certain budget categories, such as fees, do not apply to all terms. Budgets are only built for students who have Financial Aid Terms built, and only for those terms for which the Budget Required field is set to *Assgn Bdgt* (assign budget).

This section lists prerequisites and discusses how to:

- Select students for batch budget assignment.
- View batch student budget review.
- Process formulas to determine budget amounts.
- Process trees and tuition.
- Move student budgets.
- Maintain budget tables.
- Apply Pell adjustments.

Prerequisites

To use batch budget assignment, you must first create a budget run control for the combination of institution and aid year that you want to process.

See Also

Chapter 4, "Setting Up Student Budgets," Creating Budget Assignment Run Controls, page 73

Pages Used to Assign Budgets in Batch

Page Name	Definition Name	Navigation	Usage
Batch Budget Assignment - Select Students	RUNCTL_FABUDGET1	Financial Aid, Assign Budgets, Select Students, Batch Budget Assignment - Select Students	Select students for whom the Budget Required field is set to <i>Assgn Bdgt</i> on the Financial Aid Info page for the careers and terms you selected on the Create Budget Run Controls page.
Batch Student Budget Review	STDNT_BUDGET_ASGN	Financial Aid, Budgets, View Batch Budget Details, Batch Student Budget Review	View the results of the Student Budget Assign processes (FAPBDGTS, FAPBDGTF, FAPBDGTT, and FAPBDGTM).
Budget Term Detail	STDNT_BDG_DTL2_SEC	Click the Term Detail link on the Batch Student Budget Review page or the View Term Detail page.	View additional information from the student's Financial Aid Term record.
Student Budget Messages	STDNT_BDG_MSGB_SEC	Click the Message link on the Batch Student Budget Review page or the Create Student Budget page.	View messages generated during the budget assignment process.
Student Budget Message Detail	STDNT_BDG_DTLB_SEC	Click the Detail link on the Student Budget Messages page.	View the message number and additional explanation of a student budget message.
Budget Enrollment Detail	STDNT_BDG_DTL3_SEC	Click the Enrollment Detail link on the Batch Student Budget Review page.	View student enrollment plans and sports participation information for the aid year.
Batch Budget Assignment - Process Formulas	RUNCTL_FABUDGET2	Financial Aid, Budgets, Assign Budgets, Process Formula, Batch Budget Assignment - Process Formulas	Assign budget items and amounts for the budget categories assigned to students by the Stdnt Bdgt Assign - Select process (FAPBDGTS). Only used for budget categories that have a processing rule of Formula.

Page Name	Definition Name	Navigation	Usage
Batch Budget Assignment - Process Trees and Tuition Calcs (batch budget assignment - process trees and tuition calculations)	RUNCTL_FABUDGET3	Financial Aid, Budgets, Assign Budgets, Process Tuition, Batch Budget Assignment - Process Trees and Tuition Calcs	Assign budget items and amounts for the budget categories assigned to students by the Stdnt Bdgt Assign - Select process (FAPBDGTS). Only used for budget categories that have a processing rule of Tuition or Tree.
Batch Budget Assignment - Move Budgets	RUNCTL_FABUDGET4	Financial Aid, Budgets, Assign Budgets, Move Budget to Students, Batch Budget Assignment - Move Budgets	Move budget results to the student's budget record with an effective-dated row.
Batch Budget Assignment - Table Maintenance	RUNCTL_FABUDGET5	Financial Aid, Budgets, Assign Budgets, Maintain Budget Work Table, Batch Budget Assignment - Table Maintenance	Delete students from the budget work table and reset the Budget Required flag on the Financial Aid Info page in the Financial Aid Term component.
Pell Budget Adjustment	RUNCTL_FAPPBGTB	Financial Aid, Budgets, Assign Budgets, Adjust Pell Budgets in Batch, Pell Budget Adjustment	Calculate the annual Pell budget for budget categories that count towards the Pell COA.

Selecting Students for Batch Budget Assignment

Access the Batch Budget Assignment - Select Students page (Financial Aid, Assign Budgets, Select Students, Batch Budget Assignment - Select Students).

Enter the institution and aid year for which you want to assign budgets. When you move out of the Aid Year field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

Run the Stdnt Bdgt Assign - Select (student budget assignment - select) process (FAPBDGTS) when you are ready to select students.

After running the process, use the Batch Student Budget Review page to ensure that the correct budget categories were selected for the student and that the correct student population was selected during the batch.

Viewing Batch Student Budget Review

Access the Batch Student Budget Review page (Financial Aid, Budgets, View Batch Budget Details, Batch Student Budget Review).

Batch Student Budget Review

Name: Suazo, John B **ID:** FA0600
Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Find | View All First 1 of 2 Last

Budget Term Information

Term: 0540 2005 Spring **Acad Plan:** UNDECL-GR [Term Detail](#)
Career: GRAD Graduate **Acad Plan Type:** MAJ [Messages](#)
FA Term Effdt: 06/15/2004 1 **Sub-Plan:**
Financial Aid Load: Full-Time **Study Form:** ENRL

Budget Demographic Information

Dependency Status: IND **Family Members:** 03 [Enrollment Detail](#)
Housing Status: On Campus **State of Residence:** CA
Marital Status: Married **App State Res:** NJ
Postal Code: 95448

Budget Group: GSYSTEM

Category	Item Code	Description	Amount	Rule	Item Stat
BOOK	BOOK04	Books for Graduate Students	375.00	Formula	Moved
FEES	FEES	Fees assigned by Tuition Calc	350.00	Formula	Moved
HSNG	HOUSG1	Housing Graduates	4,000.00	Formula	Moved
MISC	MISC01	Miscellaneous and Personal	300.00	Formula	Moved
TRIP				Formula	Warning
TRNS	TRANCA	Transportation CA Resident	800.00	Formula	Moved
TUIT	TUITG1	Graduate Tuition	9,200.00	Formula	Moved

Batch Student Budget Review page

Use this page to view and confirm information after running these budget batch processes:

Note. The information that you view here is in a work table, so, after you run a process, this page may be blank depending on the Table Maintenance options that you set.

- After running the Stdnt Bdgt Assign - Select process (FAPBDGTS), use this page to ensure that the correct budget categories were selected for the student and that the correct student population was selected during the batch.
- After running the Stdnt Bdgt Assign - Formulas process (FAPBDGTF), use this page to ensure that the budget item amount is accurate based on the budget formula assigned.
- After running the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT), use this page to ensure that the budget item amount is accurate for those budget items determined by either tuition calculation or budget trees.
- After running the Stdnt Bdgt Assign - Move process (FAPBDGTM), student budgets, use this page to ensure that the budget item is moved successfully during the batch.

Budget Term Information

Acad Plan Type (academic plan type)	Displays the type of the academic plan. Values include: <i>Honors, Major, ROTC,</i> and <i>Concentration</i> .
FA Term Effdt (financial aid term effective date)	Displays the effective date and effective sequence of the Financial Aid Term information used to build the budget.
Financial Aid Load	Displays the student's load, determined using the number of financial aid eligible units and level/load rules.
Study Form	Displays the type of study the student is engaged in. Values include: <i>Detached, Enrollment, Abroad,</i> and <i>Candidacy</i> .
Term Detail	Click to access the Budget Term Detail page and view additional information from the student's Financial Aid Term record. You can check for information that can cause errors using this page.
Messages	Click to access the Student Budget Messages page and view error messages generated during budget assignment.

Budget Demographic Information

Family Members	Displays the number of people in the student's family, as reported on the student's application (ISIR, Profile, Institutional Application).
Housing Status	Displays the student's housing type: on campus, off campus, with relatives, or with parents.
App State Res (application state of residence)	Displays the student's state of residence, as reported on the student's application.
Enrollment Detail	Click to access the Budget Enrollment Detail page and view the student's enrollment plans and sports participation information for the aid year. You can check for information that can cause errors using this page.

Budget Item Information

The amount of budget information that appears on this page depends on the number of budget assignment processes you have run. This table lists the processes:

<i>Process</i>	<i>Fields With Data</i>
Stdnt Bdgt Assign - Select process (FAPBDGTS)	Category, Rule, and Status

Process	Fields With Data
Stdnt Bdgt Assign - Formulas process (FAPBDGTF)	For budget categories with a formula processing rule: Category, Item Code, Description, Amount, Rule, and Status For budget categories with a tuition or tree processing rule: Category, Rule, and Status
Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT)	Category, Item Code, Description, Amount, Rule, and Status
Stdnt Bdgt Assign - Move process (FAPBDGTM)	Category, Item Code, Description, Amount, Rule, and Status

Budget Group Identifies the generic budget group used for the batch.

Rule Indicates whether the budget assignment process uses a formula, tree, or other assigned possibilities—such as tuition calculations—to determine the amount assigned to the student for this budget category.

Item Stat (item status) Select one of these values:

Found: The budget assignment process was able to use the indicated rule to assign a budget item and amount to the student for the budget category.

Moved: The budget amount has been moved to the student's record.

Selected: This budget category has been selected for processing during the Stdnt Bdgt Assign - Formulas process (FAPBDGTF) or the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT).

Warning: The Stdnt Bdgt Assign - Formulas process (FAPBDGTF) or the Stdnt Bdgt Assign - Tuit/Tree process (FAPBDGTT) could not assign a budget item and amount for this budget category to the student.

Processing Formulas to Determine Budget Amounts

Access the Batch Budget Assignment - Process Formulas page (Financial Aid, Budgets, Assign Budgets, Process Formula, Batch Budget Assignment - Process Formulas).

1. Enter the institution and aid year for which you want to assign budget items and amounts.

When you tab out of the Aid Year field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

2. Run the Stdnt Bdgt Assign - Formulas (student budget assignment - formulas) process (FAPBDGTF) when you are ready to assign budget items and amounts.
3. After the process runs, view the information on the Batch Student Budget Review page to ensure that the budget item amount is accurate based on the budget formula assigned.

Processing Trees and Tuition

Access the Batch Budget Assignment - Process Trees and Tuition Calcs page (Financial Aid, Budgets, Assign Budgets, Process Tuition, Batch Budget Assignment - Process Trees and Tuition Calcs).

1. Enter the institution and aid year for which you want to assign budget items and amounts.

When you tab out of the Aid Year field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

2. Run the Stdnt Bdgt Assign - Tuit/Tree (student budget assignment - tuition/tree) process (FAPBDGTT) when you are ready to assign budget items and amounts.
3. After the process runs, view information on the Batch Student Budget Review page to ensure that the budget item amount is accurate for those budget items determined by either tuition calculation or budget trees.

Moving Student Budgets

Access the Batch Budget Assignment - Move Budgets page (Financial Aid, Budgets, Assign Budgets, Move Budget to Students, Batch Budget Assignment - Move Budgets).

1. Enter the institution and aid year for which you want to move budgets.

When you tab out of the Aid Year field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page.

2. Run the Stdnt Bdgt Assign - Move (student budget assignment - move) process (FAPBDGTM) when you are ready to move student budgets.
3. After the process runs, view information on the Batch Student Budget Review page to ensure that the budget item amount moved successfully during the batch.

Maintaining Budget Tables

Access the Batch Budget Assignment - Table Maintenance page (Financial Aid, Budgets, Assign Budgets, Maintain Budget Work Table, Batch Budget Assignment - Table Maintenance).

1. Enter the institution and aid year for which you want to maintain tables.

When you tab out of the Aid Year field, the system displays the table maintenance options for each career/term combination you set up on the Create Budget Run Controls page. The process run from this page uses the specified delete and reset options to clean up the budget work table.

2. Run the Stdnt Bdgt Assign - Delete (student budget assignment - delete) process (FAPBDGTD) when you are ready to clean up the work table. Although this process is usually run after you have moved student budgets, you can run it whenever you need to update the work table.

Applying Pell Adjustments

Access the Pell Budget Adjustments page (Financial Aid, Budgets, Assign Budgets, Adjust Pell Budgets in Batch, Pell Budget Adjustments).

Use this page to calculate the annual Pell budget for budget categories that count towards the Pell cost of attendance (COA). The Pell Budget Adjustments process (FAPPBGTB) uses the student's FA Load value from the student's Financial Aid Term record and the proration scheme that you define on the Pell Adjustments page for each budget item to determine the annual Pell budget amount for each Pell COA budget item.

You should run this process at the end of the add/drop period, because the student's term schedule (and therefore FA Load value) is stable at this point.

You must run the Student Budget Assign process before you run the Pell Budget Adjustments process.

1. Enter the institution, aid year and career for which you want to calculate the annual Pell budget based on a student's FA Load value.

Because Pell grants are available for undergraduate students only, you should select undergraduate careers only for this process.

2. Run the Pell Budget Adjustments process.

Assigning Budgets Online

Use online background budget assignment to generate budgets for individual students, using the same rules as batch background budget assignment.

This section discusses how to:

- Create budgets online.
- Review term budget information.

Pages Used to Assign Budgets Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Student Budget	STDNT_BDGT_CALC	Financial Aid, Budgets, Create Student Budget, Create Student Budget	Generate a budget online for a single student.
Student Budget Messages	STDNT_BDGT_MSG_SEC	Click the Messages link on the Create Student Budget page.	View student budget messages.

Page Name	Definition Name	Navigation	Usage
Student Budget Message Detail	STDNT_BDGT_DTL_SEC	Click the Detail link on the Student Budget Messages page.	View detailed student budget messages.
Budget Term Summary Detail	STDNT_BDGT_CAL_SEC	Click the Detail link on the Create Student Budget page.	Review and make changes to a student's term budget details.

Creating Budgets Online

Access the Create Student Budget page (Financial Aid, Budgets, Create Student Budget, Create Student Budget).

Create Student Budget

Ruth Farris ID: FAPK0206
Aid Year: 2009 Financial Aid Year 2008 - 2009 **Institution:** PSUNV

Budget Terms To Be Built

[Find](#) | [View All](#)
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Term	Career		
0610	2008 Fall	UGRD	Messages + -
0620	2009 Spring	UGRD	Messages + -

[Build Budget](#)
[Move Budget](#)

Budget Term Summary

[Find](#) | [View All](#)
First ◀ 1 of 2 ▶ Last

Term:	0620	2009 Spring	Detail + -
Career:	UGRD	Undergraduate	
Budget Group:	USYSTEM Undergraduate System Assigned		

Create Student Budget page

Budget Terms To Be Built

- Term** Select the terms for which to build a budget. You must build a budget for each term in which the student enrolls. You can only select terms created for that student for the displayed aid year.
- Career** Displays the career associated with the selected term.
- Messages** Click to access the Student Budget Message page, where you can view any messages generated during the budget assignment process.

Build Budget

After selecting the terms to build, click this button to launch the process that performs all the activities that the batch Student Budget Assignment processes performs. The process selects budget categories, uses budget formulas to determine budget items and amounts, uses trees and tuition calculation to determine budget items and amounts, and calculates the annual Pell budget based on the student's FA Load value.

Move Budget

After you verify that the budget information that appears is correct, click this button to move budget information from the budget work table to the student's budget record. This button is not available until you click the Build Budget button.

Budget Term Summary

Displays the term, career, and budget group used (if any) to build the student's budget for each term selected in the Budget Terms To Be Built group box. Use the scroll arrows to view additional terms. If you have not clicked the Build Budget button, this group box does not display any information.

Detail

Click to access the Budget Term Summary Detail page and view or update term detail information for the student after you build the budget.

See Also

[Chapter 19, "Managing Financial Aid Terms," Understanding Financial Aid Terms, page 505](#)

[Chapter 4, "Setting Up Student Budgets," Creating Budget Groups, page 65](#)

Reviewing Term Budget Information


Access the Budget Term Summary Detail page (click the Detail link on the Create Student Budget page).

Term: 0620
Career: UGRD

Student Budget Information

Dependency Status:	IND	Loan Year:	1st Yr Prv	Term Detail
Housing Status:	Off-Campus	Study Form:	ENRL	
Marital Status:	Single	Academic Plan:	UNDECL-UG	Enrollment Detail
Financial Aid Load:	Full-Time	Sub-Plan:		
Family Members:	01	State of Residence:	MA	
App State Residence:	MA	Postal Code:	01002	

Budget Group: USYSTEM

Budget Items Customize | Find |  1-7 of 7

Category	Item Code	Description	Amount	Rule	Item Stat		
BOOK	BOOK01	Books for Undergrad Programs	400.00	Formula	Found	+	-
FEES	FEES	Fees assigned by Tuition Calc	350.00	Formula	Found	+	-
LOAN	LOAN01	Average Loan Fees Undergrad	189.23		Found	+	-
HSNG	HOUS01	Housing On Campus Undergrad	3,500.00	Formula	Found	+	-
MISC	MISC01	Miscellaneous and Personal	300.00	Formula	Found	+	-
TRNS	TRANCA	Transportation CA Resident	800.00	Formula	Found	+	-
TUIT	TUITU1	Undergrad Tuition - In State	6,000.00	Formula	Found	+	-

Budget Term Summary Detail page

Use this page to review and make changes to a student's term budget details.

You can specify cents for budget item amounts on this page. For example, you might enter or update loan fees calculated by the guarantee agency. You cannot specify cents on the Create Budget Items setup page.

Note. You cannot change a budget amount if the budget item was already moved to the student's budget record.

See Also

Chapter 20, "Working with Student Budgets," Viewing Batch Student Budget Review, page 546

Maintaining a Term Budget

This section discusses how to maintain an existing term budget or create a term budget on an exception basis.

Pages Used to Maintain a Term Budget

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Budget Maintenance	STDNT_TERM_BUDGET	Financial Aid, Budgets, Maintain Term Budgets, Student Budget Maintenance	Maintain an existing term budget or create a term budget on an exception basis.
Financial Aid Term	STDNT_FA_TERM_SEC	Click the FA Term link on the Student Budget Maintenance page.	View the student's financial aid term information.
Student Budget Maintenance - Need Summary	NEED_SUMM_BGT_SEC	Click the Need Summary link on the Student Budget Maintenance page.	View a student's federal and institutional need for the aid year.
Student Detail	STDNT_BDGT_DTL1	Click the Student Detail link on the Student Budget Maintenance page.	View student information.

Maintaining an Existing Term Budget or Creating a Term Budget

Access the Student Budget Maintenance page (Financial Aid, Budgets, Maintain Term Budgets, Student Budget Maintenance).

Student Budget Maintenance

Ruth Farris ID: FAPK0206

Aid Year: 2009 Financial Aid Year 2008 - 2009 Institution: PSUNV [Update Need Summary](#)

*Career: UGRD Undergraduate [FA Term](#) [Need Summary](#) [Student Detail](#) [+](#)

*Term: 0620 2009 Spr Awd Period: Academic Instr Week: 15.0

Eff Date: 04/01/2009 Sequence: 2 User ID: PS Find First 1 of 2 Last

Budget Group: USYSTEM Undergraduate System Assigned Inst COA: 11,539.23
Fed COA: 11,539.23
Pell COA: 11,539.23
Pell LHT: 7,150.00

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount		
BOOK	BOOK01	Books	PS	400.00	Federal	400.00	400.00	+	-
FEES	FEES	FEES	PS	350.00	Federal	350.00	350.00	+	-
HSNG	HOUS01	HOUSUCM	PS	3,500.00	Federal	3,500.00	0.00	+	-
LOAN	LOAN01	LOANU01	PS	189.23	Federal	189.23	0.00	+	-
MISC	MISC01	MISC01	PS	300.00	Federal	300.00	0.00	+	-
TRNS	TRANCA	Trans CA	PS	800.00	Federal	800.00	400.00	+	-
TUIT	TUITU1	Undergrad	PS	6,000.00	Federal	6,000.00	6,000.00	+	-

Student Budget Maintenance page

To build terms on this page, you can either add budget categories manually or use a budget group. You can also use this page to view any budget by term, regardless of how it was calculated. The additions and changes made to this page go directly into the student's budget record, not a worktable.

You can specify cents for the budget item amounts on this page. For example, you might enter or update loan fees calculated by the guarantee agency. You cannot specify cents on the Create Budget Items setup page.

Update Need Summary Click this button to recalculate the Need Summary totals. The Need Summary Validation process updates the Unmet Need, Overaward Need, Unmet COA, and Overaward COA (FM and IM) totals to reflect this change in Budgets.

Career Select the student's career during the term for which you are building or viewing a budget.

Term Select the term to which the budget belongs. To view additional terms in the displayed aid year, use the scroll arrows.

Awd Period (award period) The system automatically populates this field with the default award period designation assigned to the term on the Valid Terms for Career page. You can change this value.

Instr Week (instruction weeks) Displays the weeks of instruction for the selected term as defined on the Records/Term Info page in the Financial Aid Term component.

FA Term	Click to access the Financial Aid Term page and view information entered for the student in the Financial Aid Term component.
Need Summary	Click to access the Student Budget Maintenance - Need Summary page and view the student's federal and institutional need for the aid year.
Student Detail	Click to access the Student Detail page and view student information.
Eff Date (effective date)	To modify an existing budget, add a new effective-dated row for each term you want to change. This functionality enables you to change the student's entire budget group or individual budget item amounts.
Sequence	Displays a system-generated number assigned to distinguish between effective-dated rows entered on the same date. You can have up to 10 effective-dated rows per day.
User ID	If the budget is calculated online, the system displays the user ID of the individual creating the budget; if it is calculated through the batch budget assignment process, the system displays the background process name.
Budget Group	(Optional) Enter a budget group to build a budget for the student. When you select a budget group and tab out of this field, the system displays the associated categories, item codes, amount, item class, and Pell amount.
Inst COA (institutional cost of attendance), Fed COA (federal cost of attendance), and Pell COA (Pell cost of attendance)	These fields are blank until you build a budget.
Pell LTHT (Pell less than half-time)	Displays the Pell amount for less than half-time.
User ID	If the budget item is assigned manually, the system displays the user ID of the individual assigning the budget item; if the budget item is assigned through the online or batch budget assignment process, the system displays the process name. This field cannot be changed.
Amount	Displays the per term budgeted amount associated with the budget item code. You can change this amount.
Pell Amt (Pell amount)	Displays the term budgeted amount for the Pell budget associated with the budget item code. You can change this amount.
LHT Pell Amount (less than half-time Pell amount)	Displays the term budgeted amount for the Pell LTHT budget associated with the budget item code. You can change this amount.

Note. To adjust the student's Pell budget amounts if the student's FA Load value has changed after the budget is generated, access the Student Budget Adjustments page and click the Adjust Pell button.

See Also

- [Chapter 34, "Reviewing Awards," Reviewing Student Packaging Status by Date, page 1208](#)
- [Chapter 28, "Awarding and Packaging Students," Viewing Need Summary Information, page 991](#)

Reviewing Students' Budget Information

This section discusses how to review student budget information.

Page Used to View Student's Budget Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Budget Summary	STDNT_BUDGET_SUMM	Financial Aid, Budgets, View Student Budget Summary, Student Budget Summary	Review students' budget information, including categories and amounts that comprise a student's budget, by award period.

Viewing Students' Budget Information

Access the Student Budget Summary page (Financial Aid, Budgets, View Student Budget Summary, Student Budget Summary).

Student Budget Summary						
Melinda Owens		ID: FAPK0330				
Aid Year: 2005 Financial Aid Year 2004-2005		Institution: PSUNV				
Award Period: Academic		Fed COA:	\$22,700.00	Pell COA:	\$22,700.00	Pell LTHT: \$16,600.00
		Inst COA:	\$22,700.00	Alt Pell COA:	\$12,700.00	
Budget Summary Customize Find 1-6 of 6						
Category	Description	Inst Total	Pell Total	LHT Pell Total	Fed Total	Item Class
BOOK	Books and Supplies	\$800.00	\$800.00	\$800.00	\$800.00	Federal
FEES	Tuition and Fees	\$700.00	\$700.00	\$700.00	\$700.00	Federal
HSNG	Housing	\$7,000.00	\$7,000.00	\$0.00	\$7,000.00	Federal
MISC	Miscellaneous and Personal	\$600.00	\$600.00	\$0.00	\$600.00	Federal
TRNS	Transportation	\$1,600.00	\$1,600.00	\$800.00	\$1,600.00	Federal
TUIT	Tuition and Fees	\$12,000.00	\$12,000.00	\$6,000.00	\$12,000.00	Federal
Award Period: Non Standard		Fed COA:	\$0.00	Pell COA:	\$0.00	Pell LTHT: \$0.00
		Inst COA:	\$0.00	Alt Pell COA:	\$0.00	
Budget Summary Customize Find 1 of 1						
Category	Description	Inst Total	Pell Total	LHT Pell Total	Fed Total	Item Class
		\$0.00	\$0.00	\$0.00	\$0.00	

Student Budget Summary page

This page displays information by award period.

Alt Pell COA (alternate Pell cost of attendance) Displays the sum of child care, disability, and tuition Pell amounts from the budget items assigned to the student. The Packaging routine uses this COA when awarding Pell Grants using the Alternate Pell Grant Schedule.

Pell LTHT(Pell less than half-time) Displays the Pell less than half-time amount. The Packaging routine uses this COA when awarding Pell Grants for students who are enrolled less than half-time.

Inst Total (institutional total) Displays the amount for this budget category used when the system calculates the institutional COA. Categories that have nonzero amounts in this field are institutional budget categories.

LHT Pell Total (less than half-time Pell total) Displays the amount for this budget category used when the system calculates the Pell LTHT budget.

Pell Total Displays the amount for this budget category used when the system calculates the Pell budget. The Alternate Pell budget consists of child care, disability, and tuition Pell amounts only.

Fed Total (federal total) Displays the amount for this budget category used when the system calculates the federal COA. Categories that have nonzero amounts in this field can be either institutional or federal budget categories.

Chapter 21

Defining Application Processing Options

This chapter lists prerequisites and discusses how to:

- Work with applications.
- Set up financial aid processing.
- Review cross-references.
- Use financial aid run controls for PROFILE and Need Access processes.
- Set up Need Access and PROFILE data load parameters.

Note. Oracle supports only the short form for PROFILE data received from College Scholarship Services (CSS) and Need Access data from the Access Group.

Prerequisites

The *College Board INAS User Manual*, which is delivered with this application, describes most of the functionality discussed in this chapter.

The Financial Aid system provides predefined tables in compliance with federal regulations and enables you to use the INAS process, CSS PROFILE, and Access Group Need Access institutional applications. Before you define application processing options, review these tables for warnings about the consequences of making changes.

Also, ensure that the financial aid applications used by your institution are available, and make sure that you understand the different admit levels that influence how external data loads are processed. To help you most effectively use the Financial Aid application processing, refer to these websites:

- U.S. Department of Education, Federal Student Aid: <http://www.ifap.ed.gov>
- National Association of Financial Aid Administrators (NASFAA): <http://www.nasfaa.org>
- The College Board: <http://www.collegeboard.com>
- Need Access Group: <http://www.accessgroup.org>

Working with Applications

To set up applications, use the Application Source Rank component (FA_APP_SOURCE_RANK), the Assign Status to Admit Levels component (ADMIT_LVL_TBL), and the Define Careers for Prospects component (PROSPECT_SOURCE).

This section provides an overview of application processing options and discusses how to:

- Define application source rank.
- Review admit level associations.
- Set up Academic Career assignments from the Financial Aid application

Understanding Application Processing Options

Managing financial aid application data requires coordinating many data files—both incoming and outgoing—with the Department of Education's Central Processing System (CPS) through the Student Aid Internet Gateway (SAIG). Financial Aid supports the CSS PROFILE application and Access Group's Need Access application and provides you with the tools to construct your own institutional application.

This section discusses how to control the import and export of financial aid data through the Campus Solutions system. It discusses setting up global options and defines how your institution handles both federal and institutional need analysis methodologies.

Controlling the flow of incoming need analysis data is essential because more students apply to an institution than are admitted. Admit levels are associated with an academic program status in PeopleSoft Enterprise Student Records. These levels enable you to filter requests for ISIRs, PROFILE, or Need Access applications based on a student's admission level, such as accepted or continuing, admitted, applied, or inactive.

You define your ISIR, PROFILE, and Need Access data load parameters on the Load parameter page. For example, you can elect to have a student's biographical and demographic data updated in PeopleSoft Enterprise Campus Community and request records of students that you want to process. You can process only those students with a status level of accepted or continuing. At the same time, you can elect to suspend student records not already loaded into the system, suspend incoming records if the institutional review status and federal verification is completed, or load records of ISIRs that were rejected.

For students with multiple addresses, to ensure that you send financial aid information to the correct address throughout the year, select the order in which the system checks for an address to use. For example, you can have the system locate a mailing address and if it is not available, the system searches for a second address. The Campus Solutions system shares address options, so you must coordinate address option changes with other departments that use the system.

You can define the parameters for global, federal, and institutional methodologies by using the College Board's INAS. FM is a need analysis formula used to determine the EFC toward a student's education. FM takes into account family size, the number of family members in college, taxable and nontaxable income, and assets. IM is a need analysis formula used to determine financial need for allocation of the school's own financial aid funds. Financial Aid calculates need analysis based on the options that you select.

Pages Used to Work with Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Source Ranking	FA_APP_SOURCE_RANK	Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking	Define which application the Budget Assignment background process should use for Budget Formula and Budget Tree criteria.
Admit Level Associations	ADMIT_LVL_TBL	Set Up SACR, Product Related, Financial Aid, File Management, Assign Status to Admit Levels, Admit Level Associations	Review the admit designations set up by your institution.
Prospect Source X-Ref Setup (prospect source cross-reference setup)	PROSPECT_XREF_TBL	Set Up SACR, Product Related, Financial Aid, File Management, Define Careers for Prospects, Prospect Source X-Ref Setup	Set up prospect cross-references by associating careers from external sources with an academic career at your institution. The ISIR load process uses this information to assign a default academic career for financial aid applicants who are not yet admitted.

Defining Application Source Rank

Access the Application Source Ranking page (Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking).

Application Source Ranking

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2008 Financial Aid Year 2007 - 2008

Source Rank Type: Budgets

Application Source Ranking Information Find | View All First ◀ 1 of 1 ▶ Last

***Effective Date:** 08/22/2007 31 **Status:** Active + -

***Award Period:** Academic + -

Description: Budget Source Code Ranking

Comments: Budget Source Code Ranking + -

Source Rank Detail Customize | Find | View All | First ◀ 1-2 of 3 ▶ Last

*Source of Information	Application Source	*Source Ranking	+ -
F		1	+ -
I	8	2	+ -

Application Source Ranking page

The system displays the academic institution, aid year, and source rank type.

Application Source Ranking Information

Status	Select <i>Active</i> or <i>Inactive</i> .
Award Period	Select <i>Academic</i> or <i>Non Std</i> (nonstandard), to associate the award period with the application source rank.
Description	Enter the description of the application source rank.
Comments	Enter any additional information regarding the application source rank.
Source of Information	Select the source of information. Values are: <i>FAFSA</i> (Free Application for Federal Student Aid). <i>Inst App</i> (institutional application).
Application Source	If the source of information is <i>Inst App</i> (institutional application), select from these values: <i>FT CSL</i> (Full-time Canada Student Loan), <i>Inst App</i> (institutional application), <i>NA</i> (Need Access), <i>PROFILE</i> , and <i>PT CSL</i> (Part-time Canada Student Loan).

Source Ranking

Rank your preference for source data. The system selects the lowest number first, and if that application does not exist for the student, the system searches for the next ranked item.

Note. For the Canadian Need Analysis system, run full-time CSL applications first, followed by part-time CSL applications.

Reviewing Admit Level Associations

Access the Admit Level Associations page (Set Up SACR, Product Related, Financial Aid, File Management, Assign Status to Admit Levels, Admit Level Associations).

Admit Level Associations		
Admit Level Designation		Find View 8 First 1-12 of 12 Last
Academic Program Status	Associated Admit Level	
AC Active in Program	5 - Accepted/Continuing	
AD Admitted	4 - Admitted	
PM Prematriculant	4 - Admitted	
AP Applicant	3 - Applied/Pending	
WT Waitlisted	3 - Applied/Pending	
CN Cancelled	2 - Inactive	
DE Deceased	2 - Inactive	
DM Dismissed	2 - Inactive	
LA Leave of Absence	2 - Inactive	
CM Completed Program	2 - Inactive	
SP Suspended	2 - Inactive	
DC Discontinued	2 - Inactive	

Admit Level Associations page

External data loads, such as the FAFSA and the CSS PROFILE application can consider a student's admission status and academic progress. According to your business rules, you decide how to handle different academic program statuses during the external data load and which level of student to add to the database.

The Admit Level Associations page displays the association between each academic program status and an admit level.

Note. The system delivers admit level values as translate values. Any modification to these values requires substantial programming and modification effort. However, the descriptions can be changed to fit your institution's terminology, as used by your institution.

The system displays all available academic program status options.

Associated Admit Level Associate an admit level with each academic program status. The associated admit level that you select affects the selections that you make when setting up your ISIR data load parameters. The associated admit levels are associated with the student academic program status in PeopleSoft Enterprise Student Records. Values are:

5 - Accepted/Continuing

4 - Admitted

3 - Applied/Pending

2 - Inactive

1 - Has Not Applied

Setting Up Academic Career Assignments from the Financial Aid Application

Access the Prospect Source X-Ref Setup page (Set Up SACR, Product Related, Financial Aid, File Management, Define Careers for Prospects, Prospect Source X-Ref Setup).

Prospect Source X-Ref Setup			
Academic Institution:	PSUNV	PeopleSoft University	
Prospect Data Source:	PROF	<input type="text" value="Profile Data"/>	
Career from External Source Find View All First 1-3 of 11 Last			
*Ext Car	Description	Academic Career	
<input type="text" value="0"/>	<input type="text"/>	Technical	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="1"/>	<input type="text"/>	Undergraduate	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="10"/>	<input type="text"/>	Technical	<input type="button" value="+"/> <input type="button" value="-"/>
Program from External Source Find View All First 1-2 of 2 Last			
*Ext Prog	Description	Acad Prog	
<input type="text" value="01"/>	<input type="text"/>	CERT <input type="button" value="🔍"/>	Cont Ed - Certificate Program <input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="02"/>	<input type="text"/>	LAU <input type="button" value="🔍"/>	Liberal Arts Undergraduate <input type="button" value="+"/> <input type="button" value="-"/>

Prospect Source X-Ref Setup page

The system displays the academic institution and the prospect data source for ISIR processing. ISIRnn indicates the aid year. For example, ISIR08 is for the 2007–2008 ISIRs. Refer to the annual regulatory release documentation for information on the Prospect Data Source for future financial aid years.

Career from External Source

Click the Add button to insert additional rows for external careers to associate with an academic career.

Ext Car (external career)	Select the corresponding external career sections for the CSS PROFILE application. The external career relates to the expected degree or certificate question on the FAFSA.
Description	Enter a description from the ISIR for the external career.
Academic Career	<p>Select the academic career that you want to associate with the various external career codes that come in on students' ISIR records.</p> <p>You can also assign a default academic career to ISIR records that are loaded where the expected degree question on the FAFSA is blank. Insert a new row under the Career from External Source group box and enter <i>DFLT</i> (default) in the Ext Car column. Enter the default academic career that you want to assign to the ISIR record.</p>

Program from External Source

This section is no longer used by any process.

Setting Up Financial Aid Processing

To set up financial aid processing, use the ISIR Data Load Parameters component (ISIR_INST_CONTROL), the Maintain ISIR Comment Codes component (ISIR_MESSAGES), the Maintain EDI Transactions component (FA_ECTTRANS), and the Define Commit Levels component (PROCESS_COMMIT_TBL).

This section provides an overview of financial aid processing setup and discusses how to:

- Define ISIR data load options 1.
- Define ISIR data load options 2.
- Define ISIR data load options 3.
- Define ISIR institutional search match.
- Set severity levels for ISIR reject reasons.
- Set severity levels for ISIR comment codes.
- Set up Financial Aid EDI transactions.
- Set up commit levels for COBOL processes.

Understanding Financial Aid Processing Setup

This section describes the setup for inbound and outbound ISIR file processing.

Inbound processes are used to load ISIRs and to evaluate and load error files. Not every inbound process requires a separate setup. In this section, you set up the data load parameters for loading ISIRs from the EDI staging tables into the system database.

You can control the file information that appears on the ISIR EC Queue Review and Loan EC Queue Review pages. This information is populated by the system and does not require any additional setup unless you want to change the file information that appears on the EC Queue pages.

Processing ISIRs Out of Sequence

The load process ensures that the system processes ISIR files in the order that they are loaded into the ISIR staging tables. This is achieved by using the EC Queue instance number assigned to each ISIR file as the FA EC File Inbound processes it. As long as a school loads its ISIR files based on the creation date by the CPS, the load process addresses them in order. If schools use the Process ISIR run control page to restrict the types of files to be processed, the system processes those files in load order.

If the system cannot load ISIR files into the staging tables in the proper sequence, ISIR records with a lower ISIR transaction number than the current loaded ISIR can load. However, the FM EFC and federal database match information from the older ISIR does not update the current information. You can view that information on the Packaging Status Summary panel group.

Using the EFC Override Option

You can override the Expected Family Contribution (EFC) for a student. Because schools may not want to enforce an EFC override at the point a new ISIR is loaded, the ISIR Data Load Params option of *EFC Override Encountered* controls how these records would be processed. The system enforces this option only when the Call INAS option is not used. Based on the setting of this option, the following occurs during the ISIR Load process:

<i>Ignore EFC Override Values</i>	The system processes the ISIR as if a prior EFC override never existed. The prorated EFC values that are calculated during the ISIR load function normally. An EFC Status Message of <i>EFC Override Ignored</i> posts on the ISIR Inbound Summary nn/nn component.
<i>Suspend Incoming Record</i>	The system automatically suspends the ISIR record for manual review by the staff. A new suspend reason of <i>EFC Override Found</i> posts.
<i>Use EFCs Values</i>	The system loads the ISIR, but uses established EFC override values instead of recalculating them from the ISIR information. The system posts an EFC Status Message of <i>EFC Override Used</i> on the ISIR Inbound Summary nn/nn component.

Updating NSLDS History from the ISIR

Schools receive system generated ISIRs whenever a change occurs in a student's eligibility status in the National Student Loan Database System. The load process always loads the NSLDS history if the ISIR is a NSLDS post-screening transaction and updates the NSLDS match field displayed in the Packaging Status Summary component. NSLDS data that is loaded must also be pushed into the aggregate aid tables if you opt to allow awarding and packaging to directly access NSLDS when evaluating aid eligibility. A separate Push NSLDS to Aggregates setup option is available on the ISIR Data Load Options.

Determining the ISIR Type During the ISIR Load

The ISIR load process determines the type of ISIR record—applications, corrections, or system generated—by reviewing each individual ISIR. The system accomplishes this by reviewing the Transaction Data Source/Type field on the ISIR.

Note. For a complete description of the Transaction Data Source/Type field values, review the *EDE Technical Manual*.

The following table indicates the Transaction Data Source/Type values that are selected for processing based on the ISIR Type selected on the ISIR Load Run Control page.

<i>ISIR Load Run Option</i>	<i>Transaction Data Source/Type</i>
Applications	1A, 2A, 2B, 2E, 2F, 2G, 2H, 2R, 2T, 3A, 3E, 3G, 3R, 4A, 4B, 4J, 4K, 4R, 4U, 4V, 5S, 6A, 6B, 6E, 6F, 7G, 7H, 7R, 7T
System Generated	5D, 5M, 5N, 5P, 5W, 5X
Corrections	1C, 2C, 3C, 4C, 6C

Pages Used to Set Up Financial Aid Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR Load Options 1	ISIR_INST_CONTROL	Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 1	Define how ISIR data from the CPS is loaded into the system.
ISIR Load Options 2	ISIR_INST_CONTROL2	Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 2	Define how ISIR data from the CPS is loaded into the system.
ISIR Load Options 3	ISIR_INST_CONTROL3	Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 3	Define how corrected ISIR data from the CPS is loaded into the system.

Page Name	Definition Name	Navigation	Usage
ISIR Inst SearchMatch	ISIR_INST_SRCHMCH	Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Inst Search Match, ISIR Inst SearchMatch	Define how ISIR records are processed when identified by the Search Match process. You can avoid duplicate records and determine whether the ISIR records are loaded into the database as new records, are appended to existing records in the database, or are ignored.
ISIR Reject Reasons	ISIR_REJECT_TBL	Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Reject Reasons	Review delivered ISIR reject reasons and set severity levels.
ISIR Comments	ISIR_COMMT_TBL	Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments	Review delivered ISIR comment codes and set severity levels. DB Match Use setting can be adjusted to control treatment by the Packaging process. This page links the comment codes with the long description or text defined by the Department of Education.
Financial Aid EDI Transactions	FA_ECTTRANS	Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions	Set up financial aid EDI transactions. Control the EDI transactions that can be viewed in the ISIR File Review and Loan EC Queue Review pages.
Setup Commit Levels	PROCESS_COMMIT	Set Up SACR, Product Related, Financial Aid, Define Commit Levels, Setup Commit Levels	Set up commit levels for COBOL processes. Control the commit levels for the ISIR Suspense Load (FAPSAR00) and ISIR Correction Build (FAPCOR00) COBOL processes.

Defining ISIR Data Load Options 1

Access the ISIR Load Options 1 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 1).

ISIR Load Options 1		ISIR Load Options 2	ISIR Load Options 3	ISIR Inst SearchMatch
Aid Year: 2008 Financial Aid Year 2007 - 2008		School Cd: 001315 PeopleSoft		
ISIR Load Parameters Find View All First 1 of 1 Last				
*Eff Date: 11/27/2006 Status: Active + -				
ISIR Load Options				
<input type="checkbox"/> Use Current Date As Effdt <input type="checkbox"/> Load NSLDS Data <input type="checkbox"/> Call INAS <input type="checkbox"/> Push NSLDS to Aggregates				
Update Address Options		Update Name Options		
<input type="radio"/> Discard Incoming Address <input type="checkbox"/> Override Address Type <input checked="" type="radio"/> Add if blank - Do not update <input type="radio"/> Always Update		<input type="checkbox"/> Update		
Update Email Options		Update Phone Options		Update Bio/Demo Options
<input type="radio"/> Discard <input type="radio"/> Add if blank <input type="radio"/> Always Update		<input type="radio"/> Discard <input type="radio"/> Add if blank <input type="radio"/> Always Update		<input type="checkbox"/> Update
		Update Drivers License Options		
		<input type="radio"/> Discard <input type="radio"/> Add if blank <input type="radio"/> Always Update		

ISIR Load Options 1 page

These load parameters are for processing all initial ISIR records and system-generated ISIRs.

The system displays the aid year, school code, effective date, and status.

ISIR Load Options

Use Current Date as Effdt (use current date as effective date) Select to use the current date as the effective date of the ISIR information loaded into the ISIR Data Corrections component. If you do not select the check box, the system uses an effective date based on the CPS transaction processed date.

Call INAS(call Institutional Need Analysis System) Select to enable any ISIR that is loaded to immediately run the INAS program using the current INAS options. If you do not select this check box, the ISIR is queued for Batch Need Analysis processing.

Load NSLDS Data(load National Student Loan Data System data)

NSLDS information from the ISIR is updated whenever an ISIR is loaded. Select this check box to direct the system to load new NSLDS data into the NSLDS tables when an ISIR is suspended or discarded—that is, skipped—and not loaded into the system.

NSLDS data is loaded for suspended ISIRs under these conditions:

- Search Match must not be called by the ISIR load process; this occurs automatically if an ISIR has been previously loaded for the student (for any aid year).
- A current year ISIR must be previously loaded for the student.
- The NSLDS transaction number must be greater than the current loaded NSLDS data of the same aid year.
- The NSLDS match flag cannot be 7 (match but no data provided) or 8 (record not sent to NSLDS).

Push NSLDS Aggregates

Select to push loaded NSLDS aggregate aid totals and indicators into the aggregate aid table. This data is then optionally available to the Awarding and Packaging processes. Aggregate Area Translation must be defined for the Push process to work. If you choose not to push aggregate aid totals with the ISIR Load, an independent push process (Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS) is available.

See [Chapter 5, "Setting Up Packaging Basics," Understanding Aggregate Aid, page 93.](#)

Note. The option to use the CPS transaction processed date as the effective date for the loaded data is available only for initial ISIR records loaded for the aid year. When all corrected ISIRs are loaded, the system uses the current date as the effective date.

Update Address Options**Discard Incoming Address**

Select to prevent a student's address information from being updated in personal data when an ISIR is loaded.

Add if blank - Do not update

Select if, when the ISIR is loaded, the student has no active address in personal data that matches the address usage criteria.

Always Update

Select to always update the appropriate address when the ISIR is loaded.

Override Address Type

Select to force the ISIR address to be loaded into a specific address type rather than use the ISIR address usage parameters set in the Process Demo Setup page.

Update Name Options

Update Select if, when the ISIR is loaded, the student has no active name in personal data that matches name usage criteria, to update the data with the ISIR name.

Update Bio/Demo Options

Update Select to update the bio/demo fields when the ISIR is loaded.

Update Email Options

Discard Select to prevent a student's email information from being updated in personal data when the system loads an ISIR.

Add if blank Select if the student does not have an active email address in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates an email address using the highest ranked email type defined in the usage criteria. If an existing matching address type exists, an update does not occur.

Always Update Select to always update the appropriate email address when the system loads an ISIR. The system updates the highest ranked address and phone type defined in the usage criteria.

Update Phone Options

Discard Select to prevent a student's phone information from being updated in personal data when the system loads an ISIR.

Add if blank Select if the student does not have an active phone number in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates a phone number using the highest ranked phone type defined in the usage criteria. If an existing matching phone type exists, an update does not occur.

Always Update Select to always update the appropriate phone number when the system loads an ISIR. The system updates the highest ranked phone type defined in the usage criteria.

Update Drivers License Options

Discard Select to prevent a student's driver's license information from being updated in personal data when the ISIR is loaded.

Add if blank

Select to enable the following to occur:

- If driver's license information exists for the student in the Campus Community records, the system does not load the ISIR information.
- If no driver's license information exists in the Campus Community records, the system loads the ISIR information.

Always Update

Select to always update the driver's license fields when the ISIR is loaded. The system checks for an exact match of the driver's license number and driver's license state.

If the system cannot locate an exact match, it deletes any entries for the student in the driver's license table where either the state or the license number match, and then inserts a new row with the driver's license number and state from the ISIR.

Defining ISIR Data Load Options 2

Access the ISIR Load Options 2 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 2).

ISIR Load Options 1		ISIR Load Options 2		ISIR Load Options 3		ISIR Inst SearchMatch	
Aid Year: 2008 Financial Aid Year 2007 - 2008				School Cd: 001315 PeopleSoft			
ISIR Load Parameters Find View All First 1 of 1 Last							
Eff Date: 11/27/2006				Status: Active			
ISIR Routing Controls							
Student Status Add Level:				0 - Load everyone			
Student Status Suspend Level:				0 - Anyone not loaded			
Inst. Review Status Completed:				Suspend Incoming Record			
Ed Verification Completed:				Suspend Incoming Record			
ISIR Rejects:				Suspend Incoming Record			
System Generated Load Option							
System Generated ISIR Action:				Suspend Incoming Record			
EFC Override Option							
*EFC Override Encountered:				Suspend Incoming Record			

ISIR Load Options 2 page

The system displays the aid year, school code, effective date, and status.

ISIR Routing Controls

Student Status Add Level	<p>Select the minimum admit level that a student must have for the system to load the ISIR to the application tables. Values are:</p> <ul style="list-style-type: none"> <i>0 - Load Everyone</i> <i>1 - Recruits or higher</i> <i>2 - Inactive Admits or higher</i> <i>3 - Applicants or higher</i> <i>4 - Active Admits or higher</i> <i>5 - Accepted/Continuing only</i>
Student Status Suspend Level	<p>Select the minimum admit level that a student must have for the system to suspend the ISIR. Values include:</p> <ul style="list-style-type: none"> <i>0 - Anyone not loaded</i> <i>1 - Recruit or higher</i> <i>2 - Inactive Admits or higher</i> <i>3 - Applicants or higher</i> <i>4 - Active Admits or higher</i> <i>5 - Accepted/Continuing only</i>
Inst. Review Status Completed (institutional review status completed)	<p>Select instructions for handling the ISIR if the institutional review status is complete. This status is maintained on the Packaging Status Summary page. Values are: <i>Discard Incoming Record</i>, <i>Load Record</i>, and <i>Suspend Incoming Record</i>.</p>
Ed Verification Completed (educational verification completed)	<p>Select the instructions for handling the ISIR if the educational verification is complete. This status is maintained on the Packaging Status Summary page. Values are: <i>Discard Incoming Record</i>, <i>Load Record</i>, and <i>Suspend Incoming Record</i>.</p>
ISIR Rejects	<p>Select the instructions for handling rejected ISIRs. Values are: <i>Discard Incoming Record</i>, <i>Load Record</i>, and <i>Suspend Incoming Record</i>.</p>

System Generated Load Option

System Generated ISIR Action	<p>Controls the way in which system-generated ISIRs should be processed.</p> <p>All system-generated ISIRs follow the same ISIR load options and routing control rules as regular, noncorrection ISIRs. Select from these values:</p> <p><i>Discard Incoming Record</i>: Does not load the record; sets ISIR load status to Skip.</p> <p><i>Load Record</i>: Processes the record and loads it if the load parameters are met.</p> <p><i>Suspend Incoming Record</i>: Suspends ISIRs that are pending review and sets the ISIR load status to <i>Suspended</i>.</p>
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Note. Because these ISIRs can be generated for various reasons, you might suspend all records of this type and first review them in the Suspense Management page before loading them. The load process attempts to determine and assign the ID before the record is suspended.

EFC Override Option

EFC Override Encountered Select one of the following: *Ignore EFC Override Values, Suspend Incoming Record, or Use EFCs Values.*

Defining ISIR Data Load Options 3

Access the ISIR Load Options 3 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 3).

ISIR Load Options 3 page

Use these load parameters for processing all corrected ISIRs. To identify ISIRs corrected by the recipient school, the ISIR ETI field value is checked and only those records with a value of 0, 2, 4, or 6 are selected. This indicates that the recipient school initiated the correction record, and you can process the ISIR normally. You can suspend any other ISIR ETI value, except blank, as a non-school initiated correction using the Suspend Other School Initiated and Suspend Student Initiated ISIR load options.

Note. The process of loading corrected ISIRs is not the same as for initial ISIRs. Refer to the chapter Processing INAS for details.

See [Chapter 24, "Processing INAS," page 709](#).

The system displays the aid year, school code, effective date, and status.

ISIR Corrections Load Options

Suspend on EFC Mismatch (suspend on expected family contribution mismatch)	Select to suspend the corrected ISIR if the primary EFC on the ISIR does not match the last calculated primary EFC for the student stored in PS_ISIR_COMPUTED.PRIMARY_EFC.
Suspend Other School Initiated	Select to suspend ISIRs that are initiated by another school or the CPS.
Suspend Student Initiated	Select to suspend ISIRs that are initiated by the student.

Note. A school-initiated correction is processed with the Suspend on EFC Mismatch load option set. If no previously loaded ISIR exists, the process treats the condition as an application ISIR and follows the application ISIR load parameter settings. This allows initially rejected ISIRs corrected by the school to load as initial application ISIRs.

Because a student has likely already been processed for financial aid when you receive the corrected ISIR, the system provides INAS options.

INAS Call Options

Always Call INAS (always call Institutional Need Analysis System)	Select to run the INAS calculation as the ISIR is loaded into the application tables. This is similar to the Call INAS check box on the ISIR Load Options 1 page.
Store INAS Calc Request (store Institutional Need Analysis System calculation request)	Select to store the ID and aid year of the record for later batch INAS processing.
Call INAS if EFC Change (call Institutional Need Analysis System if expected family contribution change)	Select to run an INAS calculation only if the primary EFC on the ISIR does not match the last calculated primary EFC.
Never Call INAS (never call Institutional Need Analysis System)	Select to disable the system from calling INAS when the ISIR is loaded. This feature does not support future batch INAS calculation.

Defining ISIR Institutional Search Match

Access the ISIR Inst SearchMatch page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Inst SearchMatch).

ISIR Load Options 1		ISIR Load Options 2		ISIR Load Options 3		ISIR Inst SearchMatch	
Aid Year:	2008	Financial Aid Year 2007 - 2008				School Cdt:	001315 PeopleSoft
*Search Parameter	PSCS_TRADITIONAL		CS_Person_Traditional				
No Match Found							
New:	Add	Update	Suspend	Ignore			
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Match(es) Found							
Find View All First 1-2 of 5 Last							
Order Nbr:	10	Name,Addr,City,Bday,Gender,SSN					
One Match:		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Multiple Matches:		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Order Nbr:	20	SSN Only					
One Match:		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Multiple Matches:		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			

ISIR Inst SearchMatch page

You determine how restrictive to make the Matching process. The system searches on the match that you select by reviewing personal data until it finds a match. When the search and match process runs, the program starts with the first order number and moves through the order numbers until it finds a match. If the system finds no matches at any level, then the option that you selected in the No Match Found group box takes effect. To load all students into the system regardless of match, override the No Match Found level.

Note. The search match options apply only to ISIRs where no prior year ISIR was loaded into the database.

The system displays the aid year and school code.

Search Parameter A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

No Match Found

New Select an option to indicate the action the system takes when the Search Match process does not find a matching record. Values are:

Add: The system adds the record to your database and generates a new ID for the ISIR.

Suspend: The record is put in suspense.

Ignore: The system sets the load status to *Skipped*; the ISIR is not loaded and is ignored by the load process.

The Match(es) Found group box has one row for each search match criteria order defined by your institution. Use the scroll bar to scroll through the levels of search criteria.

Match(es) Found

Order Nbr (order number)

Displays a separate listing for each order number level of search criteria. The number of search match levels depends on the Search Parameter you selected to use for the ISIR load process.

One Match

For each order number, select an option to determine how the system processes the record. Values are:

Update: The system updates the existing record with the matching record.

Suspend: The system assigns a suspended load status to the matching record.

Ignore: The system sets the load status to *Skipped*.

Multiple Matches

For each order number, select an option to determine what to do with the record. Values are:

Suspend: The system assigns a suspended load status to the matching record.

Ignore: The system sets the load status to *Skipped*; the ISIR is not loaded and is ignored by the load process.

******Parameters Refreshed******

The system displays this message in red text when the ISIR Institutional Search Match parameters are not saved or the global Search Match parameters are not changed since you last updated this page. If you change parameters and do not save the changes or if you make a change since the last changes were made, the system displays this message.

You may want to create a Financial Aid-specific Search Parameter that can perform the ISIR search match function more efficiently than the provided PSCS_TRADITIONAL. For example, you may want to create a search parameter that contains a single search match order that does a last name, Social Security number, and student birthdate match.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Search/Match"

Setting Severity Levels for ISIR Reject Reasons

Access the ISIR Reject Reasons page (Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Reject Reasons).

ISIR Reject Reasons

ISIR Comments

Aid Year:

2008

Financial Aid Year 2007 - 2008

Institution:

PSUNV

ISIR Reject Reasons

Find | View All

First

1-5 of 41

Last

*Code	Description	Severity Level
01	The simplified needs test is not met and all asset data is blank.	1 Action Req
02	Incomplete FAFSA .	1 Action Req
03	Student's Taxes Paid is greater than zero and equal to or greater than AGI.	1 Action Req
05	Missing or invalid Date of Birth.	1 Action Req
06	Father's Social Security Number was not matched with the Social Security Administration	1 Action Req

ISIR Reject Reasons page

The ISIR Message Tables component enables you to review delivered ISIR messages and assign a level of severity to each reject reason and comment code, to indicate the action required by financial aid staff.

Warning! ISIR reject reasons and ISIR comment codes are defined by the Department of Education and are delivered to your institution with each academic year release update. You can update the message tables if the CPS modifies the values after their initial release.

The system displays the aid year and institution. PSUNV is the default institution for the ISIR reject reasons. You do not need to create records for your institution values.

ISIR Reject Reasons

Code	Displays information assigned to the ISIR reject reason by the Department of Education. These codes appear on a student's SAR and ISIR.
Description	Displays the description, using the codes assigned to the ISIR reject reason by the Department of Education by default. The description and the accompanying code appear on a student's SAR and ISIR.
Severity Level	<p>Indicates the level of importance of the reject reason and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values:</p> <p><i>1 - Action Req:</i> Requires action.</p> <p><i>0 - Ignore:</i> Requires no action.</p>

Setting Severity Levels for ISIR Comment Codes

Access the ISIR Comments page (Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments).

ISIR Reject Reasons

ISIR Comments

Aid Year:2008Financial Aid Year 2007 - 2008

Institution:PSUNV

ISIR Comment Codes

Find | View 100First1-5 of 269Last

*Code	Description	Severity Level	DB Match Use	
002	This SAR reflects your Financial Aid Administrator's use of professional judgment.	0 Ignore	<input type="checkbox"/>	+ -
003	This SAR shows corrections to information that we previously entered incorrectly.	0 Ignore	<input type="checkbox"/>	+ -
004	This ISIR has been produced due to a change in your financial aid history information in the National Student Loan Data System	0 Ignore	<input type="checkbox"/>	+ -
005	We are unable to read all of the information on your FAFSA or SAR because it was damaged. Please review all of the items on this	0 Ignore	<input type="checkbox"/>	+ -
006	If you need to make corrections to your information, you may either make them online at www.fafsa.ed.gov, or by using this SAR. You	0 Ignore	<input type="checkbox"/>	+ -

ISIR Comments page

The system displays the aid year and institution. PSUNV is the default institution for the ISIR comment codes. You do not need to create records for your institution values.

The Campus Solutions system compares ISIR comments on the student's record to the ISIR Comment table to evaluate eligibility for federal aid. Each comment is associated with a severity level. The severity level associated with the DB Match Use field triggers how the system handles the database match during packaging. As an administrator, you can reset the predefined severity level value assigned to each ISIR comment.

ISIR Comment Codes

- Code

Displays codes from a table delivered by the Department of Education. These codes may appear in Part 1 of a student's SAR or ISIR.
- Description

Displays a description of the associated code from a table delivered by the Department of Education. The description may appear in Part 1 of a student's SAR or ISIR.

Severity Level

Indicates the level of importance that you want to attach to the comment code and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values:

0 - Ignore: Requires no action.

1 - Action Required: DB Match problem requires action.

2 - Action required. SAR C Flag on file.

Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the DB Match Use value is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

DB Match Use

The DB Match Use value corresponds to a U.S.E.D. database match.

Note. INAS Calc Type selection is restricted to *IM* for the latest available processing year until FM INAS is delivered.

Note. You can use the override option on the Database Matches page to override this functionality. For example, if the student has an ISIR comment with a severity level of 1 or 2, you can invoke the corresponding database match override to make the student eligible for federal aid.

See [Chapter 27, "Preparing for Awarding and Packaging," Reviewing the U.S.E.D. Database Match Process, page 958.](#)

Setting Up Financial Aid EDI Transactions

Access the Financial Aid EDI Transactions page (Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions).

Financial Aid EDI Transactions				
Customize Find View 100 First 1-9 of 142 Last				
*EC Transaction ID	*In/Out	Description	FA Use	
A002P	Outbound	CommonLine Application	CommonLine	+ -
A004P	Outbound	CommonLine 4 App Send	CommonLine	+ -
C001P	Outbound	CommonLine Change Transactions	CommonLine	+ -
C004P	Outbound	CommonLine 4 Change Send	CommonLine	+ -
C01RP	Inbound	CommonLine Change Response	CommonLine	+ -
CLAPPRESP_96	Inbound	CommonLine App Response	CommonLine	+ -
CLCHGRES_96	Inbound	CommonLine Change Response	CommonLine	+ -
CLEFTROST_96	Inbound	CommonLine EFT Roster	CommonLine	+ -
CORR00IN	Outbound	99/00 ISIR Corrections	ISIR	+ -

Financial Aid EDI Transactions page

EC Transaction ID (electronic commerce transaction ID) Displays the electronic commerce name specified for the EDI file.

In/Out Displays whether the file is inbound (to be loaded into the database) or outbound (generated by the system to be sent to an external trading partner).

Description Displays the description of the EDI file.

FA Use(financial aid use) Displays the financial aid business process that the EDI file supports. Values are: *Blank, CommonLine, Direct Lending, ISIR, and Pell.*

The system displays EDI transactions with FA Use value of ISIR in the ISIR EC Queue Review page and displays EDI transactions with FA Use value of CommonLine and Direct Lending on the Loan EC Queue Review page.

If you set the FA Use field to *blank*, the system does not display those EDI transactions review page. You might do this with prior year EDI transactions that you no longer want to appear.

Setting Up Commit Levels for COBOL Processes

Access the Setup Commit Levels page (Set Up SACR, Product Related, Financial Aid, Define Commit Levels, Setup Commit Levels).

Setup Commit Levels

Fin Aid Default Commit Level: 500

Set Commit Level			Customize	Find	View All	First	1 of 1	Last
	Process Name	Description	Commit Level					
1	FAPBUDMV		10	+	-			

Setup Commit Levels page

- Fin Aid Default Commit Level** (financial aid default commit level)

Enter the default commit level, which indicates to the system when to save records while processing for any process that does not have a specific commit level assigned to it on this page. For example, if you enter 50, the system saves the processing after every 50 records that it processes. If you do not enter a value in this field, the default commit level is 0, which directs the system to save after each record is processed.
- Process Name**

Enter or select the process name for which you want to set commit levels. Insert additional rows for each process for which you want to set a commit level.
- Commit Level**

Enter a numeric value for the commit level for each process. The commit level instructs the system when to save records while it is running a process. For example, if you enter 50, the system saves the processing after every 50 records that it processes.

Note. The appropriate commit levels to use depend on your production environment, such as the type of database, size of database, and hardware. Commit levels should be set by knowledgeable technical staff only.

Understanding ISIR Data Load Parameters

This section describes the parameters for loading ISIR data.

Reviewing Cross-References

To set up cross-references, use the ISIR/SAR Cross Reference component (ISIR_SAR_XREF) and the Institutional Cross Reference component (INST_XREF).

This section discusses how to:

- Review ISIR SAR cross-references.
- Review institutional application cross-references.

Pages Used to Review Cross-References

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR SAR Cross-reference	ISIR_SAR_XREF	Set Up SACR, Product Related, Financial Aid, Application Processing, ISIR/SAR Cross Reference, ISIR SAR Cross-reference	Review ISIR/SAR cross-references. This page is used by several background processes and online pages to link the ISIR/FAFSA field number and ISIR record field number to the table and column name in the Campus Solutions system. It cross-references the field name and description to the ISIR/FAFSA record field number.
Institutional Cross Reference	INST_XREF	Set Up SACR, Product Related, Financial Aid, Application Processing, Institutional Cross Reference	Review institutional application cross-references and audit changes to the institutional application pages. Several background processes and online pages use this table to link the institutional application field number and record field number to the table and column name in the Campus Solutions database. It cross-references the field name and description to the institutional record field number.

Reviewing ISIR SAR Cross-References

Access the ISIR SAR Cross-reference page (Set Up SACR, Product Related, Financial Aid, Application Processing, ISIR/SAR Cross Reference, ISIR SAR Cross-reference).

ISIR SAR Cross-reference

Aid Year: 2008 **Financial Aid Year** 2007 - 2008

ISIR Field Cross-Reference Information Find | View All First 1 of 12 Last

Record (Table) Name: ADDRESSES **Rec Descr:** Address Type

Customize | Find | View All First 1-4 of 4 Last

	*Field Name	Description	SAR Field/Corr#	Correctable to Blank	ISIR Field Type		
1	ADDRESS1	Student's Address	0004	<input checked="" type="checkbox"/>	Alpha	+	-
2	CITY	Student's City	0005	<input type="checkbox"/>	Alpha	+	-
3	POSTAL	Student's Zip	0007	<input type="checkbox"/>	Alpha	+	-
4	STATE	Student's State	0006	<input type="checkbox"/>	Alpha	+	-

ISIR SAR Cross-reference page

Warning! The ISIR SAR Cross-reference page is delivered annually with preloaded values and should not be changed or modified in any way.

The system displays the aid year, record (table) name, and record description.

Field Name Displays the names of the valid fields in the Financial Aid system for the table.

SAR # Displays the CPS field reference number used for correcting ISIRs and identifying highlighted fields on the ISIR/SAR for the aid year.

Correctable to Blank If selected, indicates that the field can be reported as a blank value in the ISIR correction record.

ISIR Field Type Displays the description for the ISIR field type:

Alpha: Alpha Numeric
MMDDYY: Date (MMDDYY)
MMYY: Date (MMYY)
Numeric
Signed Num: Signed Numeric
Batch Year: Date (Batch Year)
Mixed Case

Reviewing Institutional Application Cross-References

Access the Institutional Cross Reference page (Set Up SACR, Product Related, Financial Aid, Application Processing, Institutional Cross Reference).

Institutional Cross Reference

Aid Year:2008Financial Aid Year 2007 - 2008Institution:PSUNV

Find | View AllFirst3 of 5Last

Record (Table) Name:INST_PARENTRecord Description:Institutional Parent App Data

Customize | Find | View AllFirst1-6 of 89Last

	*Field Name	Description	INST Field Nbr	Aid Year		
1	ADJ_TO_INCOME		0103	2008	+	-
2	AFDC_BENEFITS		0109	2008	+	-
3	AGI		0097	2008	+	-
4	AGI_PAR_INST		0142	2008	+	-
5	BUSINESS_DEBT		0080	2008	+	-
6	BUSINESS_VALUE		0079	2008	+	-

Institutional Cross Reference page

Warning! The Institutional Cross Reference page is delivered annually with preloaded values. These values should not be changed in any way.

The system displays the aid year, academic institution, record (table) name, and record description.

Field Name	Displays the names of fields in the Financial Aid system for the table.
Description	Displays the field contents.
INST Field Nbr (institutional application field number)	Displays the institutional application field number that corresponds to the field in the Financial Aid system.
Aid Year	Displays the aid year of the institutional application field number.

Using Financial Aid Run Controls for PROFILE and Need Access Processes

This section discusses how to define run controls for PROFILE and Need Access processes.

Page Used for Financial Aid Run Controls for PROFILE and Need Access Processes (only for 2009–2010 and Prior Aid Years)

Page Name	Definition Name	Navigation	Usage
PROFILE/Need Access Run Controls	RUNCTL_CPS	Financial Aid, File Management, PROFILE - Need Access Controls, PROFILE/Need Access Run Controls	Define run controls for PROFILE and Need Access processes (only for 2009–2010 and Prior Aid Years).

Defining Run Controls for PROFILE and Need Access Processes

Access the PROFILE/Need Access Run Controls page (Financial Aid, File Management, PROFILE - Need Access Controls, PROFILE/Need Access Run Controls).

Profile/Need Access Run Controls

Academic Institution: PSUNV PeopleSoft University
Process Name: FAPFIN08 07/08 Profile Load

Run Parameters

Update Switch:	Yes ▼	Last Run Date:	02/26/2007
Count of Records:	30	Last Sequence Nbr:	1
Input File Path:	\\BURSQA01\rat02\INAS and Pell flatfiles_2008\IM_2008.dat		

PROFILE/Need Access Run Controls page

The fields display for the process that you select. The Count of Records, Last Run Date, and Last Sequence Nbr (last sequence number) fields are display-only fields that appear for all of the processes. You can edit the Update Switch field for all of the processes.

- Update Switch** Select *No* to run the process in simulation. When you select *No*, the process does not update any records or tables. You can then view the log file to see potential issues or the information that would have been updated. Select *Yes* to run the process and update the records or tables.
- Count of Records** Displays the number of records generated from the export process.
- Input/Output File Path** Enter the path to the location of the file.
- Add Action** Select *Add to Database (Replace)* or *Add (Do NOT Replace)*.

Setting Up PROFILE Data Load Parameters

To set up PROFILE data load parameters, use the PROFILE Load Parameters component (INST_LOAD_CONTROL).

Page Used to Set Up PROFILE Data Load Parameters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PROFILE Data Load Parameters	INST_LOAD_CNTRL	Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters, PROFILE Data Load Parameters	Set up the PROFILE application parameters for your institution. PeopleSoft Enterprise Campus Solutions supports the College Board <i>CSS PROFILE</i> application.



Setting Up PROFILE Data Load Parameters



Access the PROFILE Data Load Parameters page (Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters).

Profile Data Load Parameters

Institution: PSUNV PeopleSoft University
Aid Year: 2011 Financial Aid Year 2010 - 2011


Profile Data Load Parameters Find | View All First 1 of 1 Last

***Effective Date:** 08/21/2009  **Status:** Active 


Profile Data Use  

☐ Update Name Data
☐ Update Bio/Demo Data





Profile Address Use

☒ Discard Incoming Address **Address Type:**
☐ Add if blank - Do not update Campus 
☐ Always Update

Profile Phone Use

☒ Discard Incoming Phone **Phone Type:**
☐ Add if blank - Do not update 
☐ Always Update

Profile Routing Control

***Student Status Add Level:** 4 - Active admits or higher 
***Student Status Suspend Level:** 3 - Applicant or higher 
***Search Parameter:** CS_Person_Traditional 
***Max Search Match Level:** SSN Only 
***Search/Match No Match Action:** Suspend 

<p>EFC Source</p> <p><input type="radio"/> Estimated FM Calc <input checked="" type="radio"/> IM Base Calc <input type="radio"/> IM w/Options <input type="radio"/> Larger of three</p>	<p>Overrides/INAS Options</p> <p><input type="checkbox"/> Use EFC Override Values <input checked="" type="checkbox"/> Store INAS Calc Request</p>
---	---

PROFILE Data Load Parameters page

Note. When this page opens an error message might display such as "Fields Parameter Code and Max Search Match Level reset to blank. (14404,413) The Search Match Criteria has been modified more recently than the effective date on this page. Please insert a new effective-dated row on this page or update the current effective data to the present day. Then reenter the value for the field(s) mentioned above." This error message displays when the Search Match parameter criteria was set up after the effective date of this run control. By adding a new effective-dated row and resetting the fields mentioned in the error message, the PROFILE load process uses valid search match criteria.

Effective Date Select an effective date for this aid year.

Status Select a status for this aid year.

PROFILE Data Use

Update Name Data Select to enable PROFILE name data to update Campus Community data.

Update Bio/Demo Data Select to enable PROFILE biographical and demographic data to update Campus Community data. Updated fields include Marital Status, Gender, DOB, Citizenship, and Visa
(update biographical and demographic data)

PROFILE Address Use

Discard Incoming Address Select if you do not want to update Campus Community address information.

Add if blank - Do not update Select to have the system add the address from the file with the address type that appears in the Address Type field when there is no Campus Community address information.

For example, if *PERM* appears in the Address Type field, the system identifies and adds the address as a permanent address type.

Always Update Select to always update Campus Community address information. When selected, the designated address is updated with the value specified in the Address Type field.

Address Type Select the Address Type to be used when either adding or updating an address.

PROFILE Phone Use

Discard Incoming Phone Select if you do not want to update Campus Community phone number information.

Add if blank - Do not update	<p>Select to have the system add the phone number from the file with the phone type that appears in the Phone Type field when there is no Campus Community phone information.</p> <p>For example, if <i>Mobile</i> appears in the Phone Type field, the system identifies and adds the address as a mobile phone type.</p>
Always Update	Select to always update Campus Community phone information. When selected, the designated phone number is updated with the value specified in the Phone Type field.
Phone Type	Select the Phone Type to be used when either adding or updating a phone number.

PROFILE Routing Control

Student Status Add Level	<p>Select an add level to define the students for whom you want to process PROFILE data. This is where you see the numeric hierarchy affect admit levels. Values are:</p> <p><i>0 - Load Everyone</i></p> <p><i>1 - Recruits or higher</i></p> <p><i>2 - Inactive Admits or higher</i></p> <p><i>3 - Applicants or higher</i></p> <p><i>4 - Active Admits or higher</i></p> <p><i>5 - Accepted/Continuing only</i></p>
Student Status Suspend Level	<p>Select a level to define the PROFILE records to retain in the PROFILE Suspense table. You can select these students again in future data loads. Values are:</p> <p><i>0 - Anyone not loaded</i></p> <p><i>1 - Recruits or higher</i></p> <p><i>2 - Inactive Admits or higher</i></p> <p><i>3 - Applicants or higher</i></p> <p><i>4 - Active Admits or higher</i></p> <p><i>5 - Accepted/Continuing only</i></p>
Search Parameter	<p>A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule. The delivered Campus Solutions search Parameter is called PSCS_TRADITIONAL.</p>

Max Search Match Level

Select a maximum search match level, which determines how restrictive the Matching process should be. The values in this field depend on the value selected in the Search Parameter field. The system searches on the match level that you select, plus the more restrictive matches that come before it. For example, if you select a match of 20 (SSN Only in PSCS_TRADITIONAL), the search process first uses the more restrictive match of 10—or any match number less than 20—that you set up in the system.

Values are:

Name, Adddr, City, Bday, Gender, SSN

SSN Only

Name, Bday, Gender

Name, Gender

Name Only

Search/Match No Match Action

Select the action to take when a record fails the Search/Match criteria designated in the Search Parameter

Values are:

Suspend — Move the record into the Suspense Management table

Allow Add if Eligible — Consider the record for the Add Level Rules and/or Suspense Level Rules.

EFC Source

Indicate the source to use by selecting IM Base Calc (institutional methodology base calculation), IM w/Options (institutional methodology with options), or Larger of two.

Overrides/INAS Options**Use EFC Override Values**

Select to enable the Load Program and the Suspense/Move Program to evaluate the activation of the Use EFC Override Value check box on the INAS Institutional Extension pages and load those values into the Contribution for Student row of the Computation Data page. The override values are identified with an O on the Computation Data page.

Store INAS Calc Request

Select to insert the student into the INAS Calculation Request (INAS_CALC_RECS) table during the PROFILE Load. The batch INAS calculation process calculates an EFC for any student found on the INAS Calculation Request (INAS_CALC_RECS) table. Defaults to selected.

Chapter 22

Processing Federal Financial Aid Applications

A student's financial need depends on how much a family can reasonably be expected to contribute toward the student's education. The student first files the Free Application for Federal Student Aid (FAFSA), a federally approved need analysis form administered by the Department of Education. The Financial Aid system supports all versions of the FAFSA.

The Institutional Student Information Record (ISIR) summarizes information submitted on the student's FAFSA and provides the student's Expected Family Contribution (EFC). The ISIR also includes full applicant data, information on eligibility matches, NSLDS financial aid history, comments, assumptions, and reject reasons.

Some schools might require other need analysis forms or an institutional aid application. Institutional application processes, the College Board's *CSS PROFILE* application, and the Access Group *Need Access* application are described in the chapter *Processing and Using Institutional Financial Aid Applications*.

This chapter provides an overview of federal financial aid application processing and discusses how to:

- Process inbound files.
- Manage suspended ISIRs.
- Make ISIR corrections.
- Process outbound files.
- Process rejected ISIR correction files.
- Work with ISIRs.
- Delete ISIR and NSLDS information.
- View ISIR history.
- View ISIR reports.
- Review ISIR correction audits.

See Also

Chapter 24, "Processing INAS," page 709

Understanding Federal Financial Aid Application Processing

To coordinate incoming and outgoing data files with the U.S. Department of Education's Central Processing System (CPS), you transmit data using the Department of Education's Student Aid Internet Gateway (SAIG) communications software, vendor supplied software, or software developed by your own institution.

CPS sends the student's FAFSA information contained in the ISIR data record and you load the data into the Financial Aid system. You can then override assumptions and rejects, add your institution to a student's ISIR, make ISIR corrections, exchange data with the CPS, validate and manage corrections, view EFC status, and review comments.

Financial Aid application processing consists of inbound and outbound processing. Inbound processing refers to ISIR records sent to your institution from the CPS. Outbound processing refers to ISIR correction records and requests to add your institution to the student's ISIR.

To load financial aid application information from the ISIR, use inbound processes:

1. When you receive a download from the CPS, run the FA Inbound process to deposit the entire batch into ISIR staging tables.

NSLDS and some Direct Loan files are loaded using this process.

2. Run the ISIR Load process (FAPSAR00) to load the files from the ISIR staging tables into the database.

The ISIR Load process uses your ISIR data load parameters and process demographic settings. ISIR records that are not loaded are marked as suspended for manual review or are automatically discarded based on your institution's data load parameter settings.

To send out ISIR corrections or add institution requests to the CPS, use outbound processes:

1. Run the ISIR Correction Outbound (FAPCOR00) process to gather all the data files marked to send.

This process selects corrected ISIR records, requests to add the institution, and ISIR signatures records and copies them into the outbound staging tables.

2. Run the inbound ISIR Correction Errors process (FASAREXX) to evaluate record level error files that have been received from the CPS (message classes CORE0XOP, EAPR0XOP, SIGA0XOP). If the file contains history correction errors, the process updates the matching Correction Management page records.
3. Run the FA Outbound process to select records in the outbound staging tables and generate ISIR correction and FAFSA Signature files for transmission to CPS.

Processing Inbound Files

You load ISIRs from the CPS, create and send ISIR corrections and FAFSA signature files to the CPS. The FA Inbound process automatically determines the type of file from CPS and loads the file into the inbound staging tables.

First, the FA Inbound process loads records from the CPS files into the ISIR EDI staging tables. Then the ISIR Load process loads the data from the staging tables into the database using the ISIR data load parameters; only files meeting the criteria are moved into the database.

The FA Inbound process generates artificial header and trailer information for the files loaded into the staging tables. The header row contains a batch number assigned to the loaded file. The trailer row contains a count of the number of ISIRs in the file. You can view this information in the ISIR Inbound Summary components.

This section provides an overview of the FA inbound process and describes how to load ISIR files.

Pages Used to Process Inbound Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load external financial aid electronic commerce files.
ISIR File Load	RUN_CNTL_FAPSAR00	Financial Aid, File Management, ISIR Import, Process ISIRs, ISIR File Load	Load the ISIR records from the ISIR staging tables into the database using the rules that you set up in the ISIR Data Load Parms page. This page supports multiple ISIR load criteria settings for a single run control ID.
ISIR File Review	FA_EDI_ECQUEUE	Financial Aid, File Management, Review CPS/NSLDS Transactions, ISIR File Review	Review all inbound and outbound files to the CPS. You can use the search page to select the type of CPS files to review.
Financial Aid EDI Transactions	FA_ECTrans	Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions	Control the EDI transactions that can be viewed in the ISIR EC Queue Review and Loan EC Queue Review pages.
ISIR Batch Load Summary Report	RUNCTL_FA914	Financial Aid, File Management, ISIR Import, ISIR Load Summary Report, ISIR Batch Load Summary Report	Create a summary of all ISIR batches that have been loaded with statistics on the load status of the ISIRs in each batch.
ISIR Suspense Detail Report	SFA_RUNCTL_FA927	Financial Aid, File Management, ISIR Import, ISIR Suspense Detail Report	Generate a Crystal report of all suspended ISIRs for a selected Aid Year.

Understanding the FA Inbound Process

The FA Inbound process reads the file and searches for the listed files using the path defined in the file list. After processing the file list, the system creates a new file in the same directory as the original file. The name of the new file is the name of the file list with an appended date/time stamp. For example, if LIST1.TXT were processed September 1, at 9 A.M., the name of the new file is LIST1.TXT20040901090000.

If an error is found for a file in the list file, the FA Inbound process loads the previous files into the database and then stops processing. The files after the file in error are not processed.

The new file lists the files that were successfully processed, and, if an error is found, the file in error. The error file is listed last with the message "Error not processed." appended to the file path. For example, if LIST1.TXT contained five ISIR files, and the third file, ISDF05OP.003, had an error, the LIST1.TXT20040901090000 file would read:

```
\\JSERVER1\2005\ISDF05OP.001
```

```
\\FILESERV\2005\ISDF05OP.002
```

```
Error not processed: C:\ISIR\2005\ISDF05OP.003
```

The remaining two files defined in the file list were not processed and are not listed.

Use the message log to view the files that the system loaded successfully or unsuccessfully and any error messages. Use the File/Log Viewer to read these messages.

Note. Even when a problem occurs with the load process, the Process Monitor might display the run status as Success. To determine whether all files in a file list were successfully processed, open the data stamped list file and verify that the last row in the file does not read: *Error not processed*.

The FA Inbound process assigns an ISIR TG number to ISIR files that are loaded into the staging tables. The ISIR File Load process selects ISIR files with matching TG numbers to process. All others are ignored until the ISIR load is run with the same TG number.

ISIR files may contain a request title record as the first row in the file if schools use queries to request ISIRs from the datamart. A blank first row may be present for schools that do not use queries. The FA Inbound process skips these rows.

Note. Because the FA Inbound process reads the first position of the ISIR file to determine the type of ISIR, if you use the request title functionality at the datamart, do not begin the query name with a number. This may cause the request title row to be loaded into the staging tables, but it does not stop the ISIR rows in the file from being loaded nor does this affect the further processing of the ISIRs.

Processing ISIRs for Multiple Schools at Same Destination

For destinations with multiple valid school codes, the load process attempts to identify and assign the owning school code. For example, destination TG51234 receives ISIRs for school codes E01300 and E01301. A student completes the FAFSA and lists both schools as recipients. The electronic destination receives a single ISIR.

The Multi School Flag field to determine which school codes belong to the same destination. The initiator of the ISIR is also identified. If one of the matching schools initiated the ISIR, then the ISIR is processed for that school. If none of the matching schools initiated the ISIR, such as when it was initiated by the student or another school, then the following occurs:

1. The system compares the identified school codes to the ISIR Data Load parameter records for the aid year. If a single school code match exists between the ISIR and data load parameters, the system processes the ISIR with the data load parameters of the matching school code.
2. If no match exists, the ISIR errors with a message of 2 – *Invalid School Code*.

3. If multiple matches of the ISIR Data Load parameter records exist, the system checks for a previously loaded ISIR and uses the owning school code for the most recent loaded ISIR. Otherwise, the ISIR suspends with a message of *S – Unable to Select School Code*.

You can reassign the correct federal school code to suspended ISIRs on the ISIR Suspend Management page and then reprocess them.

Processing Multiple Institution Files

The ISIR load process evaluates each ISIR record to determine the appropriate recipient of the file. In most cases, by checking the school codes listed on the ISIR and the ISIR ETI and Multi School Flag fields, the process is able to determine the correct school code and institution to process the ISIR. One condition exists for which the process is unable to do so. Assigning a TG number during the FA EC Inbound process resolves this condition.

This condition occurs when a customer is set up with multiple institutions, where each institution is represented by a separate TG destination number, and where a student completes a FAFSA for schools belonging to separate TG numbers for the same customer.

For example, State University is comprised of two institutions and is set up as follows:

- Institution: SUWEST (TG number: 52222, School code: E52222)
- Institution: SUEAST (TG number: 53333, School code: E53333)

New students often apply for admissions to both schools and submit their FAFSA information to both. As a result, State University receives separate, identical ISIR records for these students (one per TG number). This is because the two institutions represent separate TG numbers, and the multi-school flag fields are not populated. Currently, when the ISIR load is run for one institution, the system processes both ISIRs of these students at the same time, where one file is processed with the incorrect ISIR Data Load parameters and can be loaded to the incorrect institution and owning school code.

By assigning the correct TG number for each ISIR file that is loaded, the condition described above is corrected.

Note. It is the responsibility of the school to assign the correct TG number when loading ISIR files into the staging tables.

Identifying Correction ISIRs Not Initiated by the School

The system performs the following evaluation to identify ISIRs corrected by the recipient school. The system checks the ISIR ETI field value and only those records with a value of 0, 2, 4, or 6 are selected. This indicates that the recipient school initiated the correction record, and you can process the ISIR normally. For all other values, an additional check against the ISIR Source of Correction field is performed to determine whether the ISIR was initiated by the student, another school, or the CPS.

You can control which of these correction ISIRs are processed with the Suspend Student Initiated and Suspend Other School Initiated load options for corrected ISIRs. You may want to suspend all non-school initiated ISIRs first and then review the fields that were corrected in the nn/nn ISIR Suspend Management, Corrected fields page before determining how to process the record.

Note. Corrected ISIRs initiated by the CPS are treated as other school initiated.

Processing Corrections

Because application and correction ISIRs can be grouped in the same file, running the ISIR load process with only the Applications record type option selected causes the process to ignore any corrected (and system generated) ISIRs in the file. The load status of these skipped records remains unchanged until you use the correct record type option to process these records.

A school-initiated correction is processed with the Suspend on EFC Mismatch load option set. If no previously loaded ISIR exists, the process treats the condition as an application ISIR and follows the application ISIR load parameter settings. This allows initially rejected ISIRs corrected by the school to load as initial application ISIRs.

If you process a student initiated corrected ISIR with the Suspend Student Initiated ISIR load option deactivated, or process a non-school initiated corrected ISIR with the Suspend Other-School Initiated option deactivated, the system treats the ISIR as an application ISIR and follows the application ISIR load parameter settings. The correction ISIR load parameters are ignored.

Any ISIR that has the duplicate SSN indicator set always suspends. Because this indicates that the social security number on the ISIR has been used by another application, users should evaluate the record before loading the ISIR in the suspense management component.

Note. When NSLDS Post screening transaction ISIRs (system-generated transactions) are processed, the NSLDS information is always loaded.

Loading ISIR Files

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files, FA Inbound).

The screenshot shows the 'FA Inbound' page with the following fields and controls:

- Run Control ID:** PS
- Report Manager** and **Process Monitor** links.
- Run** button.
- Run Option:** ☒ **Single File** and ☐ **File List**
- Inbound File:** \\ple-rpurusho\Tools\PT848-803-R2\appserv\prcs\HC900TST\files\ISIR_07ICE.txt
- ISIR TG Number:** 34567

FA Inbound page

Run Option

Select one of the following run options:

Single File: The file listed in the Inbound File field is one of the supported EDI files. This is the default.

File List: The file listed in the Inbound File field is a list of files to be processed.

ISIR TG Number Assign the appropriate ISIR TG number for the ISIRs that are loaded. When processing a file list, the system assigns the same TG number to all ISIRs in the list.

The FA_INBOUND process supports the loading of most ISIR file types for the current and following aid year as well as the following additional file types.

<i>File Type</i>	<i>Message Class/Input File Name</i>
Import School Account Statement (Fixed-Length, Disbursement Level Loan Detail)	DSDF07OP
Import School Account Statement (Fixed-Length, Loan Level Loan Detail)	DSLFF07OP
Entrance Counseling Results (Fixed-Length)	DECF07OP
Exit Counseling Results (Fixed-Length)	DLFF07OP
NSLDS Transfer Alert	TRALRTOP
NSLDS Financial Aid History	FAHEXTOP

Managing Suspended ISIRs

All ISIR records are loaded into the ISIR staging tables before moving into the database. These records are never deleted. You can look at and review an entire batch of ISIR records or you can look at an individual student's ISIR processing information.

After the ISIR file has been loaded from the staging tables to the database, you can view the ISIR data from the ISIR Data Corrections component.

This section discusses how to:

- Use ISIR suspense management.
- View detailed status information from the ISIR Load process.
- View information generated by CPS for the ISIR.
- View ISIR reject codes.
- Review corrected fields.
- Manage ISIRs suspended in batch.

Pages Used to Manage Suspended ISIRs

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for two active aid years.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR Suspense Management nn/nn	ISIR_SUSP_CNTRPIAnn	Financial Aid, File Management, ISIR Import, 20nn-20nn Suspense Management, ISIR Suspense Management nn/nn	Review all ISIR records processed by the FA Inbound and FAPSAR00 processes. ISIRs from batches that have been set to Processed in the ISIR EC Queue Review page are not viewable on this page.
View ISIR Load Information	ISIR_STAGEINF5_SEC	Click the ISIR Load Information link on the ISIR Suspense Management nn/nn page.	View detailed status information generated by the FAPSAR00 process for the selected ISIR.
CPS Generated Fields	ISIR_CPS_GEN_INFnn	Click the CPS Generated Data link on the ISIR Suspense Management nn/nn page.	View information generated by CPS to assist in resolving suspended ISIRs.
Reject Reasons	ISIR_SUSP00REJ_SEC	Click the ISIR Reject Reasons link on the ISIR Suspense Management page.	View ISIR reject codes.
Corrected Fields	ISIR_CORR_SEC	Click the Corrected Fields link on the ISIR Suspense Management page.	Review which fields were corrected in the current ISIR. This link is only available if corrections were made.
ISIR Inbound Load Summary	ISIR_nn_IN_SRCH	Financial Aid, File Management, ISIR Import, 20nn-20nn ISIR File Data, ISIR Inbound Load Summary	View processing information for all ISIRs within a single batch file. The page displays processing information for each ISIR record in the ISIR staging tables. View the load status to determine whether the record has been loaded into the database. If the file is suspended or erred after the ISIR Load process runs, view the reason. The page also provides data to help associate the ISIR record with a student.

Page Name	Definition Name	Navigation	Usage
Header and Trailer Data	ISIR_nn_IN_HSEC	Click the Header and Trailer Data link on the ISIR Inbound Load Summary page.	View header and trailer information for the ISIR record.
ISIR Data 1	ISIR_nn_IN_1SEC	Click the ISIR Data 1 link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View the FAFSA questions reported on the ISIR, in the staging tables.
ISIR Data 2	ISIR_nn_IN_2SEC	Click the ISIR Data 2 link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View Federal database match and FM computational information reported on the ISIR, in the staging tables.
NSLDS Data 1	ISIR_nn_IN_3SEC	Click the NSLDS Data 1 link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View NSLDS history information reported on the ISIR, in the staging tables.
NSLDS Data 2	ISIR_nn_IN_4ASEC	Click the NSLDS Data 2 link on the ISIR Inbound Load Summary page: Inbound File Data tab.	View NSLDS history information reported on the ISIR, in the staging tables.
NSLDS ACG	NSLDS_ACG	Financial Aid, Awards, View NSLDS Loan Data,. and click the NSLDS ACG tab.	Review a summary of a student's last three ACG awards.
NSLDS NSG	NSLDS_NSNG	Financial Aid, Awards, View NSLDS Loan Data. and click the NSLDS NSG tab.	Review a summary of a student's last three NSG awards.
NSLDS Loan Detail	NSLDS_ERR_CD_SEC	Financial Aid, Awards, View NSLDS Loan Data, click the NSLDS Loan Detail tab, and then click the Detail link.	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.

Using ISIR Suspense Management

Access the ISIR Suspense Management nn/nn page(Financial Aid, File Management, ISIR Import, 20nn-20nn Suspense Management, ISIR Suspense Management nn/nn).

ISIR Suspend Management 10/11			
EC Queue Instance/Seq. No:		2 1	Transaction Receipt Date: 08/30/2009 Load Status: Suspended
ISIR Manual Load Parameters			
ID:	FA0333	<input type="checkbox"/> ID Lock	<input type="radio"/> Add ISIR <input checked="" type="radio"/> Recycle <input type="radio"/> Skip/Done <input type="button" value="Process ISIR"/>
Institution:	PSUNV	School Code:	001315
Process Dt (Effdt):	09/01/2009	Alternate Effective Date:	
Student Information			
Last Name:	BYRON	First Name:	ALLON MI: P
SAR ID:	457-78-0251 AL 01	SSN:	957-78-8907 Date of Birth: 07/03/1980
Dependency Status:	D Dependent w/Primary EFC	Primary EFC:	10608
Federal PELL Eligibility:		Student's Admit Lvl:	5 - Accepted/Continuing
ED Verification Status:		Verification Select/Tracking:	Y 1029
ISIR Load Information CPS Generated Data ISIR Reject Reasons Search Match Corrected Fields			

ISIR Suspend Management nn/nn page

EC Queue Instance/Seq. No This is the unique internal number associated with the batch to which this record belongs.

Load Status Displays the status of the student's ISIR record in the ISIR staging tables after the ISIR load process runs. Values include:

Loaded: The record successfully loaded from the ISIR staging tables into the database.

Error: An error occurred while trying to match the record to a similar record in the database. For example, if a batch of ISIR records for the wrong CPS School Code was loaded into the ISIR staging tables, then every record in the batch errors. Errors have an additional Error Code message. Use the ISIR Load Information link to view detailed information.

Skip/Done: Either the record has been successfully loaded into the ISIR application tables or the load program ignored the record because it was instructed to do so based on the ISIR data load parameters or manual set on the Suspend Management page.

Suspended: The record did not load into the database from the ISIR staging tables because the record did not meet the ISIR load parameters. Use the ISIR Load Information link to view detailed information.

Unproc (unprocessed): The FA Inbound process loaded the record loaded into the ISIR staging tables, but the ISIR Load process has not yet be run for the record.

ISIR Manual Load Parameters

ID	Click the search button to open a search page to assign student's ID to a suspended ISIR.
ID Lock	Select to load the suspended ISIR record into the database to a specified ID. This works with the Add ISIR load option. When both this check box and the Add ISIR option are selected, the system adds the ISIR data to the record identified in the ID field. For example, a record status is suspended but an ID is found for the record. Activating the ID lock causes the record to load if all other ISIR load parameters are met.
Institution	Select an institution to which the selected ISIR loads directly from this page.
Process Dt (Effdt) (process date effective date)	The date the CPS processed this ISIR record. The Transaction Processed date on the ISIR record is used to set the effective date of the ISIR record. View the effective date in the ISIR Corrections component. If an unloaded ISIR record has a transaction processed date that predates the existing active ISIR record, the record suspends with <i>suspend reason #7 – ISIR Tran Num Out of Seq.</i>
School Code	<p>The owning school code of the ISIR that is set when you run the ISIR Load process. When the load process cannot determine the owning school code, the system suspends the ISIR with a suspend reason of <i>Unable to Select School Code</i>. Schools must enter the school code for which the ISIR is to be assigned. Use the ISIR Load Information page to view the school codes listed on the student's ISIR.</p> <hr/> <p>Note. You must select one of the school codes entered by the student on the FAFSA or subsequent corrections to the student's ISIR may result in rejection by the CPS.</p> <hr/>
Alternate Effective Date	To load a suspended ISIR with suspend reason #7 into the database, change the effective date by entering an alternate effective date for this student. The alternate effective date should be greater than the current effective date. You cannot select a future date.
Add ISIR	Select this option to add the ISIR record to the database without enforcing the ISIR data load parameters. The system adds the ISIR record the next time the ISIR Load process runs. When you select <i>Add ISIR</i> , also select the ID Lock check box if you want to force the use of the ID in the ID field. Selecting the ID Lock prevents the system from looking for another ID when it is adding the ISIR. You can also use <i>Add ISIR</i> to reload previously loaded ISIR records.
Recycle	<p>This is set by the ISIR load process if a student's ISIR cannot be loaded into the database because it does not fit the ISIR data load parameters.</p> <p>Select to cause the system to attempt to load the record the next time the load process runs.</p>

Skip/Done

This is set by the system when the ISIR record has been added to the database.

Select for any suspended ISIR records that you do not want loaded into the database.

Process ISIR

Click this button to run the ISIR load process for the selected ISIR that you want to load directly from this page. Unless you set the Add ISIR load option, the ISIR Load logic and load parameters for new ISIRs are performed.

Viewing Detailed Status Information from the ISIR Load Process

Access the View ISIR Load Information page (click the ISIR Load Information link on the ISIR Suspense Management nn/nn page).

View ISIR Load Information	
Load Information	
Suspend Reason:	Duplicate SSN Indicated
Skip Reason:	
Error Code:	
Max Match Level:	20
Process Instance:	1569
Process Date:	10/05/2009
School Choices/Multiple School Flags	
1st Choice:	001315
2nd Choice:	001328
3rd Choice:	001804
4th Choice:	001989
5th Choice:	003736
6th Choice:	001808
7th Choice:	
8th Choice:	
9th Choice:	
10th Choice:	

View ISIR Load Information page

Note. All suspended records have an ISIR Load Action status set to Recycle. All recycle status records that are not loaded are automatically reviewed the next time the ISIR Load process runs.

The ISIR Load process executes the ISIR load rules on individual ISIR records in the staging tables and tests for institutional review status, education verification completed, and for ISIR computation rejects.

The record is further verified to pass the ISIR routing control criteria. If it fails, the process posts a suspend status and suspend reason. Other load rules are performed on ISIR correction or system-generated files.

Load Information

Suspend Reason

Displays the reason the record was suspended and not loaded into the database and is blank if the record successfully loaded. Values include:

1 – Student Not Found (Max Match): Search Match/Search Match By-pass failed to identify an ID that matches the ISIR.

2 – Inst Review Status: This routing control option was triggered.

3 – Ed Verification Completed: This routing control option was triggered.

4 – ISIR Compute Rejects: This routing control option was triggered.

5 – Record Suspend Level: The student's admit level.

7 – ISIR Tran Num Out of Seq: An ISIR with a greater transaction number, but an earlier process date was encountered.

D – Duplicate SSN Indicated: An ISIR suspends if the CPS reports that the SSN is used for another ISIR.

E – EFC Mismatch: The Correction ISIR Suspend reason if you select this as a correction data load parameter.

G – System Generated Record: All system generated ISIRs suspend if you select this data load option.

Unable to Select School Code: ISIR record was suspended because the load process could not determine the owning school code.

Skip Reason

Displays the reason the record did not load into the database. Values include:

2 – Inst Review Status: This routing control option was triggered.

3 – Ed Verification Completed: This routing control option was triggered.

4 – ISIR Compute Rejects: This routing control option was triggered.

5 – Record Suspend Level: This routing control option was triggered.

7 – Search/Match option set to Discard/Skip: ISIR skips if you select this Search/Match option.

G – System Generated Record: All system generated ISIRs skip if you select this data load option.

Error Code	Displays the reason the Suspend Reasons is set to Error Encountered. Values include: <i>1 – Invalid SSN</i> <i>2 – Invalid School Code</i> <i>3 – SQL Error Encountered</i> <i>4 – Update/Add PD Error (personal data error)</i> <i>5 – Update/Add Address Error</i> <i>6 – Update/Add PS Names Error</i> <i>7 – Blank Date for Effective Date</i> <i>8 – Correction Record not found</i>
Max Match Level (maximum match level)	Indicates the search/match level at which the ISIR record was matched to an ID.
Process Instance	Displays the process number that the load process assigned when the process last ran. Use to view and print messages generated by the load process.
Process Date	The date that the load process last ran.

School Choices / Multiple School Flags

School code choices reported on the ISIR record are listed when the ISIR is intended for multiple CPS schools of the same destination number (TG number). This group box indicates the school that generated the ISIR transaction or was listed on the transaction and whether the ISIR type is a daily, requested, or pushed.

Each character in the six-character code corresponds to one of the six federal school code fields listed on the ISIR. Any value reported represents the ETI value of the matching school. Only the schools of the same destination have a value in the field.

Viewing Information Generated by CPS for the ISIR

Access the CPS Generated Fields page (click the CPS Generated Data link on the ISIR Suspend Management nn/nn page).

CPS Generated Fields		
CPS Generated Information		
Transaction Data Source/Type:	1A	Electronic Application
Application Data Source/Type:	4A	Paper Application
Address Only Change Flag:	4	More than one address
CPS Pushed ISIR Flag:		
NSLDS Post-Screening Code 1:	02	Overpayment added
NSLDS Post-Screening Code 2:	06	Loan in disability discharge
NSLDS Post-Screening Code 3:	07	Loan out of discharged status
Processed Record Type:		
History Correction Applied:	01	
Source of Correction:	D	CPS
Electronic Institution Ind:	4	001999
Reprocess Code:		
EFC Change Flag:	1	EFC Increase
ISIR SAR C Flag Changed:	Y	SAR C Flag Has Changed
Rejected Status Change Flag:		
Verification Select Chng Flag:		
ISIR Elec Trans Indicator:	1	Non-School Generated, Daily

CPS Generated Fields page

Transaction Data Source/Type	Source of the current ISIR record (Electronic, Web Student, Web, FAA, Paper, CPS, FSAIC - Federal Student Aid Information Center) and the type of ISIR (application, correction, renewal, Signature page, and so on). The ISIR load process uses this value to determine which records are processed.
Application Data Source/Type	Source and type of the original ISIR transaction.
Address Only Change Flag	Indicates whether mailing or email information was the only item changed on the current ISIR.
CPS Pushed ISIR Flag	Indicates that CPS initiated the ISIR transaction. <i>Y</i> - Transaction is automatically sent to school in cases of an EFC change, SAR C change, or system-generated ISIR. ISIRs with a value of <i>Y</i> are treated as a system-generated ISIR.
NSLDS Post-Screening Code 1, NSLDS Post-Screening Code 2, and NSLDS Post-Screening Code 3	The NSLDS Post-screening field values on the ISIR.

Processed Record Type	Indicates whether the ISIR record is based on a Correction Application (<i>C</i>), a correction of an initial ISIR (<i>H</i>), or is an initial ISIR (blank).
History Correction Applied	ISIR transaction number of an earlier ISIR record from which the current ISIR data is derived.
Source of Correction	Who initiated the current corrected ISIR record: A: Applicant D : CPS S: School Blank if not a corrected ISIR.
Electronic Institution Ind (electronic institution indicator)	School that initiated the current ISIR.
Reprocess Code	Code that explains why the CPS generated a revised ISIR.
EFC Change Flag	Indicates whether the EFC has increased or decreased from the previous ISIR.
ISIR SAR C Flag Changed	Indicates that the SAR C Flag has changed from the previous ISIR transaction.
Rejected Status Change Flag	Indicates that the rejection status is set or removed from the previous ISIR transaction.
Verification Select Chng Flag (verification select change flag)	Indicates that the ISIR is now selected for verification when the previous transaction was not selected.

ISIR Elec Trans

Indicator (ISIR electronic transaction indicator)

Indicates whether the school receiving the ISIR generated the transaction or was listed on the transaction. Also indicates whether the type of ISIR is a daily, requested, or pushed ISIR. ETI values:

Blank: No destination code associated or school not participating.

0: School generated transaction and is an ISIR daily school.

1: School did not generate transaction and is an ISIR daily school.

2: School generated transaction and is an ISIR request school.

3: School did not generate transaction and is an ISIR request school.

4: School generated transaction, is an ISIR daily school, ISIR is CPS pushed.

5: School did not generate transaction, is an ISIR daily school, ISIR is CPS pushed.

6: School generated transaction, is an ISIR request school, ISIR is CPS pushed.

7: School did not generate transaction, is an ISIR request school, ISIR is CPS pushed.

8: School did not generate transaction, is an ISIR daily school, ISIR is CPS pushed (system generated).

9: School did not generate transaction, is an ISIR request school, ISIR is CPS pushed (system generated).

Viewing ISIR Reject Codes

Access the Reject Reasons page (click the ISIR Reject Reasons link on the ISIR Suspense Management page).

Reject Reasons	
ISIR Reject Reasons	
Reject Reason Codes:	S T 5 P 18 E F
Reject Reason 1:	S Father's Social Security Match but no date of birth match.
Reject Reason 2:	T Mother's Social Security Match but no date of birth match.
Reject Reason 3:	5 Missing or invalid Date of Birth.
Reject Reason 4:	P Invalid SSN range.
Reject Reason 5:	18 SSN not on Social Security Administration's database.
Reject Reason 6:	E Father's SSN match, but no name match.
Reject Reason 7:	F Mother's SSN match, but no name match.
Signature Reject EFC:	12345

Reject Reasons page




Signature Reject EFC

Displays the primary 9–month EFC when all data is provided except valid signatures.

Reviewing Corrected Fields

Access the Corrected Fields page (click the Corrected Fields link on the ISIR Suspense Management page).

Corrected Fields

Corrected Fields		Customize Find 	First 	1-5 of 5	 Last
Fieldname	Correction Status				
Student Last Name	Field corrected in this transaction				
Student Postal Code	Field corrected in this transaction				
Student Telephone Number	Field corrected in this transaction				
Parent U.S. Tax Paid	Field corrected in this transaction				

Corrected Fields page

The system reads the Correction Flag field on the ISIR and displays which fields were corrected. The system uses the ISIR/SAR Cross Reference setup data to display the field names on this page.

Managing ISIRs Suspended in Batch

Access the ISIR Inbound Load Summary page (Financial Aid, File Management, ISIR Import, 20nn-20nn ISIR File Data, ISIR Inbound Load Summary).

Note. Click the tabs in the scroll area to access multiple views of this page. Elements common to all views are documented in the section on common page information.

Common Page Information

- Original SSN** (original Social Security Number)

The original Social Security Number entered on the FAFSA by the student.
- Name CD** (name code)

The first two letters of the student's last name reported on the FAFSA used with the original SSN by the CPS to uniquely identify the student.
- Trans Nbr** (transaction number)

The transaction number of the ISIR.
- Header and Trailer Data**

Click this link to view header and trailer information for the ISIR record.

ISIR Batch Detail Records Tab

Access the ISIR Inbound Load Summary, ISIR Batch Detail Records subpage (click the Student Information tab on the ISIR Inbound Load Summary page).

ISIR Inbound Load Summary

EC Transaction ID: CPS_ISIR_2011EC Queue Instance: 2

Batch Number: PS2009-10-05-00.46.24ISIR Load Date:Time: 10/05/09 12:46AM

Header and Trailer Data

Inbound ISIR Batch Detail

CustomizeFindView All

First1-4 of 4Last

ISIR Batch Detail Records

Student InformationLoad InformationISIR Inbound File Data

	Original SSN	Name CD	Trans Nbr	Load Status		EmplID	Suspend Reason	Admit Level
1	457-78-0251	AL	01	Suspended	Suspense	FA0333	Duplicate SSN Indicated	5
2	495-98-0252	DA	01	Loaded		FA0335		5
3	466-77-0253	LU	01	Loaded		FA0338		5
4	486-75-0254	LO	01	Loaded		FA0339		5

ISIR Inbound Load Summary page, ISIR Batch Detail Records tab

Load Status

Displays the current status of the ISIR batch files loaded into the ISIR staging tables.

Loaded indicates the ISIR batch file is loaded into the ISIR staging tables and will be loaded into the database the next time the ISIR Load process (FAPSAR00) is run.

Processed indicates the ISIR batch file no longer needs to be reviewed by the ISIR Load process.

Suspense

Click this link for a suspense file to navigate to the ISIR Suspense Management nn/nn page.

EmplID

The ID number assigned to this student.

Suspend Reason

This field on the ISIR Batch Detail Records tab and the Load Information tab displays the reason the record was suspended and not loaded into the database. It is blank if the record was successfully loaded. If all records in the EC Queue instance are loaded, this field does not display.

Values include:

1 – Student Not Found (Max Match): Search Match/Search Match By-pass failed to identify an ID that matches the ISIR.

2 – Inst Review Status: This routing control option was triggered.

3 – Ed Verification Completed: This routing control option was triggered.

4 – ISIR Compute Rejects: This routing control option was triggered.

5 – Record Suspend Level: The student's admit level.

7 – ISIR Tran Num Out of Seq: An ISIR with a greater transaction number, but an earlier process date, was encountered.

D – Duplicate SSN Indicated: An ISIR suspends if the CPS reports that the SSN is used for another ISIR.

E – EFC Mismatch: The Correction ISIR Suspended Reason if you select this as a correction data load parameter.

G – System Generated Record: All system generated ISIRs suspend if you select this data load option.

Admit Level

Displays the admit level for this record.

Student Information Tab

Access the ISIR Inbound Load Summary page, Student Information subpage (click the Student Information tab on the ISIR Inbound Load Summary page).

ISIR Inbound Load Summary

EC Transaction ID:

CPS_ISIR_2011

EC Queue Instance:

2

Batch Number:

PS2009-10-05-00.46.24

ISIR Load Date/Time:

10/05/09 12:46AM

[Header and Trailer Data](#)

Inbound ISIR Batch Detail

Customize

|

Find

|

View All

|

First

◀

1-4 of 4

▶

Last

ISIR Batch Detail Records

Student Information

Load Information

ISIR Inbound File Data

	Original SSN	Name CD	Trans Nbr	SSN	Last Name	First Name	MI	Birthdate		
1	457-78-0251	AL	01	957-78-8907	BYRON	ALLON	P	07/03/1980	Search Match	Bio-Demo
2	495-98-0252	DA	01	895-98-0509	DAVI	DUARTE	W	08/06/1980		
3	466-77-0253	LU	01	866-77-8899	LIU	TIMOTHY	W	08/25/1980		
4	486-75-0254	LO	01	886-75-8869	LOGGI	JOANNE		12/23/1979		

ISIR Inbound Load Summary page, Student Information tab

The Last Name, First Name, MI, and Birthdate values are from the ISIR.

Search Match

Click this link to connect to the search match component.

Bio Demo

Click this link to connect to the PeopleSoft Enterprise Campus Community Bio Demographic component.

Load Information Tab

Access the Load Information subpage (click the Load Information tab on the ISIR Inbound Load Summary page).

ISIR Inbound Load Summary

EC Transaction ID:

CPS_ISIR_2011

EC Queue Instance:

2

Batch Number:

PS2009-10-05-00.46.24

ISIR Load Date:Time:

10/05/09 12:46AM


[Header and Trailer Data](#)

Inbound ISIR Batch Detail

Customize

Find

View All



First

1-4 of 4

Last

ISIR Batch Detail Records

Student Information

Load Information

ISIR Inbound File Data

	Original SSN	Name CD	Trans Nbr	Load Action	Suspend Reason	Skip Reason	EFC Status Message	Error Code	Process Instance
1	457-78-0251	AL	01	Recycle	Duplicate SSN Indicated				1569
2	495-98-0252	DA	01	Ignor/Skip					1544
3	466-77-0253	LU	01	Ignor/Skip					1544
4	486-75-0254	LO	01	Ignor/Skip					1544

ISIR Inbound Load Summary page, Load Information tab

Load Action

Values include *Add ISIR*, *Ignore/Skip*, and *Recycle*.

Suspend Reason

This field displays the reason the record was suspended and not loaded into the database. It is blank if the record was successfully loaded. If all records in the EC Queue instance are loaded, this field does not display.

Values include:

1 – Student Not Found (Max Match): Search Match/Search Match By-pass failed to identify an ID that matches the ISIR.

2 – Inst Review Status: This routing control option was triggered.

3 – Ed Verification Completed: This routing control option was triggered.

4 – ISIR Compute Rejects: This routing control option was triggered.

5 – Record Suspend Level: The student's admit level.

7 – ISIR Tran Num Out of Seq: An ISIR with a greater transaction number, but an earlier process date, was encountered.

D – Duplicate SSN Indicated: An ISIR suspends if the CPS reports that the SSN is used for another ISIR.

E – EFC Mismatch: The Correction ISIR Suspended Reason if you select this as a correction data load parameter.

G – System Generated Record: All system generated ISIRs suspend if you select this data load option.

Skip Reason

Reason the record did not load into the database, such as:

2 – Inst Review Status: This routing control option was triggered.

3 – Ed Verification Completed: This routing control option was triggered.

4 – ISIR Compute Rejects: This routing control option was triggered.

5 – Record Add Level: This routing control option was triggered.

7 – Search/Match option set to Discard/Skip:—ISIR skips if you select this Search/Match option.

G – System Generated Record: All system-generated ISIRs skip if you select this data load option.

Error Code	<p>The reason that the Suspend Reasons is set to Error Encountered. Values include:</p> <p><i>1 – Invalid SSN</i></p> <p><i>2 – Invalid School Code</i></p> <p><i>3 – SQL Error Encountered</i></p> <p><i>4 – Update/Add PD Error</i></p> <p><i>5 – Update/Add Address Error</i></p> <p><i>6 – Update/Add PS Names Error</i></p> <p><i>7 – Blank Date for Effective Date</i></p> <p><i>8 – Correction Record not found.</i></p>
Process Instance	<p>Number that the load process assigned when the process last ran. Use to view and print messages generated by the load process.</p>

ISIR Inbound File Data Tab

Access ISIR Inbound File Data subpage (click the ISIR Inbound File Data tab on the ISIR Inbound Load Summary page).

ISIR Inbound Load Summary

EC Transaction ID:

CPS_ISIR_2011

EC Queue Instance:

2

Batch Number:

PS2009-10-05-00.46.24

ISIR Load Date:Time:

10/05/09 12:46AM


[Header and Trailer Data](#)

Inbound ISIR Batch Detail


Customize

Find


View All



First



1-4 of 4



Last

ISIR Batch Detail Records

Student Information

Load Information

ISIR Inbound File Data

	Original SSN	Name CD	Trans Nbr	ISIR Data 1	ISIR Data 2	NSLDS Data 1	NSLDS Data 2
1	457-78-0251	AL	01	ISIR Data 1	ISIR Data 2	NSLDS Data 1	NSLDS Data 2
2	495-98-0252	DA	01	ISIR Data 1	ISIR Data 2	NSLDS Data 1	NSLDS Data 2
3	466-77-0253	LU	01	ISIR Data 1	ISIR Data 2	NSLDS Data 1	NSLDS Data 2
4	486-75-0254	LO	01	ISIR Data 1	ISIR Data 2	NSLDS Data 1	NSLDS Data 2

ISIR Inbound Load Summary page, ISIR Inbound File Data tab

Click the links for ISIR Data 1, ISIR Data 2, NSLDS Data 1, or NSLDS Data 2 to view the ISIR information in the ISIR staging tables.

Making ISIR Corrections

Use the ISIR Data Corrections component to review and correct FAFSA application information loaded from the ISIR. All ISIR field modifications are maintained in the ISIR correction audits component.

This section provides an overview for processing ISIR corrections and discusses how to:

- Use the ISIR correction component.
- Review FAFSA information.
- Correct assumptions and school code information.
- View EFC status and database matches.

See Also

Chapter 24, "Processing INAS," Overriding Expected Family Contribution (EFC), page 749

Understanding ISIR Corrections

When a corrected ISIR loads, a new effective-dated row is inserted into the ISIR Data Corrections component. The current date is the effective date, not the CPS transaction process date.

The federal database match information on the ISIR updates in the packaging status summary, database match page. You cannot alter the database match field. Override fields on this page reflect an institutional override of the database match results.

NSLDS information loads if the NSLDS information on the ISIR is more recent than the current loaded NSLDS information, based on the NSLDS transaction number.

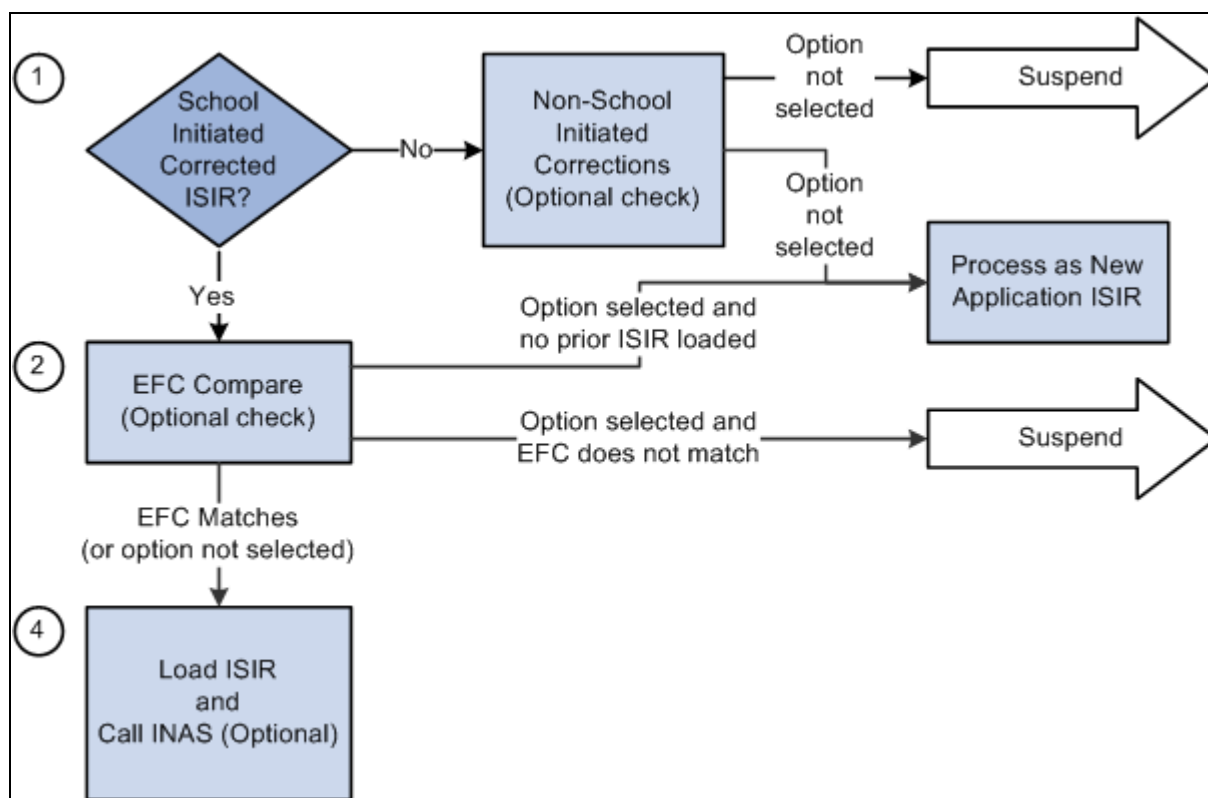
Two data load options allow you to:

- Suspend the ISIR if the primary EFC on the ISIR does not match the primary EFC displayed in the ISIR Data Corrections component.
- Control the INAS process for corrected ISIRs.

This section discusses the ISIR correction load logic.

Note. The system loads only corrected ISIRs submitted by your school. Corrections made by another institution, those initiated by the student, or initiated by CPS do not process and must be resolved individually in the ISIR Suspense Management page.

The following diagram reviews the ISIR correction load logic.



ISIR Load Logic

The FAPSAR00 process performs the following steps to process corrected ISIRs:

1. The system compares the Original SSN and Name code from the ISIR against all loaded ISIRs to determine whether the ISIR is loaded.

If no match is found, the ISIR suspends with a suspend reason of *Student Not Found*.

If a previously loaded ISIR is found, the next check is performed.

The system verifies that the ISIR was corrected by the school by checking either the ISIR ETI or the appropriate Multi-School flag fields.

If a previously loaded ISIR exists for the student, the correction ISIR is loaded and assigned a load status of *Change Processed*.

If the system determines that the corrected ISIR was not initiated by the school, two options are available: Suspend Non-School Initiated ISIRs and Process Non-School Initiated ISIRs as new Application ISIRs.

2. Optionally, you can compare the primary EFC on the ISIR with the primary EFC on the ISIR Data Corrections component.

If they do not match, the ISIR suspends with a suspend reason of *EFC Mismatch*.

If the EFCs match, the ISIR loads and calls a final optional feature.

If no previously loaded ISIR exists with which to make the comparison, the load process handles the corrected ISIR as a new application ISIR.

If you do not select the option to compare EFCs, the ISIR loads and calls a final optional feature

- You can determine whether a new INAS calculation is performed after the ISIR loads.

Pages Used to Make ISIR Data Corrections

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FAFSA Information	ISIR_PIA_CS1_nn	Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, FAFSA Information	Correct information on the FAFSA Information page.
Address Use	ISIR_ADR_MNT_SEC	Click the Student Address link on the FAFSA Information page.	View the student's Campus Community address used for the ISIR Correction file. Your ISIR Address Usage parameters and the Owning School Code determine the address, which you can override.
Original ISIR Address	ISIR_ORG_ADR_SEC	Click the ISIR Address link on the FAFSA Information page.	View address information for the student reported on the current ISIR.
INAS Federal Extension	INAS_FED_EXTnn_SEC	Click the FM link on the FAFSA Information page.	Override INAS local policy options.
INAS Federal Extension Budget Durations	INAS_FEDEX_DUR_SEC	Click the Budget Durations link on the INAS Federal Extension page.	Override INAS local policy options for federal academic and non-standard budget duration.
INAS Federal Extension EFC Proration Options	INAS_FEDEX_PRO_SEC	Click the EFC Proration Options link on the INAS Federal Extension page.	Override EFC proration options for method and non-standard months.
INAS Federal Extension EFC Override	INAS_FEDEX_EFC_SEC	Click the Override Federal EFC link on the INAS Federal Extension page.	Override EFC components for academic and non-standard award periods.
INAS Institutional Extension 1	INAS_PROF_EXT1_S04	Click the IM link on the FAFSA Information page or from any tab in the Maintain Application 20nn-20nn component.	Override INAS local policy options or institutional calculations on a student-by-student basis.

Page Name	Definition Name	Navigation	Usage
Institutional Budget Durations	INAS_PRFX_DUR_SEC	Click the Budget Durations link or the Override Institutional EFC link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the Override Institutional EFC link on the INAS Institutional Extension 1 page.	Override INAS local policy options for institutional academic and non-standard budget duration.
Change Student Income Values	ISIR_ASM_ST1_SECnn	Click the Assumptions link within the Student Data - Financial Information group box on the FAFSA Information page.	Edit any fields that are unavailable for entry on the main page due to the CPS assigning an assumed value to the field.
Change Student Status Values	ISIR_ASM_ST2_SECnn	Click the Assumptions link within the Student Data - Dependency Status Information group box on the FAFSA Information page to open the Change Student Status Values page.	Edit any fields that are unavailable on the main page because the CPS assigned an assumed value to the field.
Change Parent Household Information	ISIR_ASM_PR2_SECnn	Click the Assumptions link within the Parent Data - Parent Background Information group box on the FAFSA Information page.	Change the Assumption Indicator for fields pertaining to parent household information to correct the fields on the Parent Data - Parent Background Information page.
Change Parent Earnings and Income Values	ISIR_ASM_ST1_SECnn	Click the Assumptions link within the Parent Data - Parent Financial Information group box on the FAFSA Information page.	Change the Assumption Indicator for each of the fields pertaining to parent financial information so that the field can be corrected on the Parent Data – Parent Background Information page.
Assumptions and School Codes	ISIR_PIA_CS2_nn	Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, Assumptions/School Codes, Assumptions and School Codes	Enter corrections to a student's choice of school and housing, to override a student's dependency status, and to override FAFSA Assumption and/or Reject information on behalf of the student. You can use this page to override this data.

Page Name	Definition Name	Navigation	Usage
EFC\DB Matches\Corr	ISIR_PIA_CS3_nn	Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, EFC\DB Matches\Corr	View the EFC details for a student and information about all ISIR database matches and processing flags set by the CPS.
Need Summary Monthly EFC	NEED_SMRY_EFC_SEC	Click the Monthly EFC link within the EFC Information group box on the EFC/DB Matches page.	View information about the primary and secondary expected family contributions.

Using the ISIR Correction Component

This section discusses how to use the ISIR correction component.

Correcting ISIR Data

The system stores and displays each loaded ISIR in a separate effective-dated row that cannot be modified. To correct an ISIR record, insert a new effective-dated row in the component by clicking the Add (+) button located at the top of the page. The Add button is available for uncorrected ISIR records.

When the CPS has used an assumed value, the field is unavailable and is marked with an 'a' at the right of the field value. Use the corresponding assumptions page to make the field correctable.

Numeric Fields That Support a Blank, Non-Zero Value

Several numeric fields on the ISIR Data Corrections pages support a blank, non-zero value so that the INAS calculation can be used to determine a usable value for the field. These values also appear blank if reported blank on the ISIR rather than appear as zero. The fields include:

- AGI (student and parent)
- U.S. Taxes Paid (student and parent)
- Cash and savings (student and parent)
- Investment Net Worth (student and parent)
- Student's Income, Spouse's Income, Father's Income, and Mother's Income.
- Business/Farm Net Worth (student and parent)
- All Untaxed Income fields (student and parent)
- All Additional Financial Total fields (student & parent)

Reviewing FAFSA Information

Access the FAFSA Information page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, FAFSA Information).

FAFSA Information		Assumptions\School Codes		EFC\IDB Matches\Corr	
Zender, Catherine		ID:		FA0332	
Aid Year: 2011		Financial Aid Year 2010 - 2011		Institution: PSUNV	
<div>Find First 1 of 1 Last</div> <div> <div>Effective Date: 09/01/2009</div> <div>Transaction Nbr: 1</div> <div>Correction Status: <input type="text"/></div> <div>Status Date: <input type="text"/></div> <div>INAS</div> </div>					
EFC Status: Official		Primary EFC: 13,522		Prorated EFC: 13,522	
				FM IM Need Summary	
Actual Bio/Demo Data			ISIR Bio/Demo Data		
<input type="checkbox"/> Correct Name	First Name: Catherine	Middle: A	First Name: CATHERINE	Middle: A	
	Last Name: Zender		Last Name: ZENDER		
<input type="checkbox"/> Correct Address	Student Address		ISIR Address		
<input type="checkbox"/> Correct SSN	897-98-9980		SSN: 897-98-9980		
<input type="checkbox"/> Correct Date of Birth	10/15/1980		Date of Birth: 10/15/1980		
<input type="checkbox"/> Correct Telephone	606/781-5246		Telephone Number: 606/781-5246		
<input type="checkbox"/> Correct Citizenship	1 Native		Citizenship Status: 1 U.S. citizen		
Visa/Permit Number			Alien Registration Number: <input type="text"/>		
			Driver's License Number: D96816768		
			Driver's License State: KY Kentucky		
			Email Address: <input type="text"/>		
<input type="checkbox"/> Correct Email					
Student Data - Enrollment Information					
Enrollment Status 2010-2011:		Full Time <input checked="" type="radio"/> 3/4 Time <input type="radio"/> 1/2 Time <input type="radio"/> Below 1/2 <input type="radio"/> Don't Know <input type="radio"/>			
Student Data - Background Info					
State of Residence: KY Kentucky		Res Prior 05: Blank <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/>		Residency Date: <input type="text"/>	
Male or Female: Male <input type="radio"/> Female <input checked="" type="radio"/>		Register with Sel Serv: Blank <input checked="" type="radio"/> Register Me <input type="radio"/>			
Degree/Certificate: 1st Bachelor Degree <input type="text"/>		Current Grade Level: 1st yr Attended Before <input type="text"/>			
HS Diploma or Equivalent: High school diploma <input checked="" type="radio"/>		GED <input type="radio"/> Home schooled <input type="radio"/> None of the above <input type="radio"/>			
Rcvd 1st Bach Deg By 7-01-2010: Yes <input type="radio"/> No <input checked="" type="radio"/>					
Teacher Coursework: Blank <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Don't Know <input type="radio"/>					
Work Study or Student Loans: Work Study <input type="radio"/> Student Loans <input checked="" type="radio"/> Both <input type="radio"/> Neither <input type="radio"/> Don't Know <input type="radio"/>					
Drug Conviction Affecting Elig: Blank <input type="radio"/> No <input checked="" type="radio"/> Yes (Part Year) <input type="radio"/> Yes/Don't Know <input type="radio"/>					

FAFSA Information page (1 of 4)

Student Data - Financial Information

2009 Federal Benefits Received: SSI ☐ Food Stamps ☐ School Lunch ☐ TANF ☐ WIC ☐

Dislocated Worker: Blank ☐ Yes ☐ No ☒ Don't Know ☐

Tax Return Filed: Blank ☐ Already Filed/Completed ☐ Will File ☒ Will Not File ☐

Tax Form Used: Blank ☐ IRS 1040 ☒ IRS 1040A/EZ ☐ Foreign Tax Return ☐ U.S. Territory Tax Return ☐

Eligible For 1040A or 1040EZ: Blank ☒ Yes ☐ No ☐ Don't Know ☐

Assumptions

AGI: 4,686

U.S. Tax Paid: 0

Exemptions: 01

Student Income: 4,686

Spouse Income: 0

Cash Savings: 50

Investment Net Worth: 7,000

Bus/Farm Net Worth:

Tax Deferred Pension: 0

Self Employment Payment: 0

Child Support Received: 0

Interest Income:

Untaxed IRA Distributions: 0

Untaxed Pensions: 0

Military Allowance: 0

Veterans Non-Ed Benefits: 0

Other Untaxed Income: 0

Other Unreported Income: 0

Untaxed Income: 0

Educational Credits: 0

Child Support Paid: 0

Need-Based Employment: 0

Grant/Scholarship Aid: 0

Combat Pay:

Co-op Earnings:

Add. Financial Total: 0

FAFSA Information page (2 of 4)

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Student Data - Dependency Status Information					
Assumptions	DOB Before 01/01/87:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Dependents:	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Graduate Student:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Orphan, Ward, Foster Care:	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Married:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Veteran:	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Children:	Yes <input type="radio"/> No <input type="radio"/>	On Active Duty:	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Emancipated Minor:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Youth determined by SDL:	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Legal Guardianship:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Unaccompanied Youth(HUD):	Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Risk of Homelessness:	Yes <input type="radio"/> No <input checked="" type="radio"/>			
	Marital Status:	Blank <input type="radio"/> Single <input checked="" type="radio"/> Married/Remarried <input type="radio"/> Separated <input type="radio"/> Divorced/Widowed <input type="radio"/>			
	Marital Status Date:	<input type="text"/>	Marital Status (Personal Data):	Single	
	Dependency Status:	D DEP	Citizenship Status:	1 Citizen	
Student Data - Independent Student Information					
	Number in Family:	<input type="text"/>	Number in College:	<input type="text"/>	
Parent Data - Background Information					
Assumptions					
Marital Status:	Blank <input type="radio"/> Married/Remarried <input checked="" type="radio"/> Single <input type="radio"/> Divorced/Separated <input type="radio"/> Widowed <input type="radio"/>				
Marital Status Date:	<input type="text"/>				
Legal Residence:	<input type="text" value="KY"/> Kentucky	Res Prior 05:	Blank <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/>	Date of Legal Residence:	<input type="text"/>
Father's SSN:	<input type="text" value="231-08-8627"/>	Father's Last Name:	<input type="text" value="ZENDER"/>	Number in Family:	<input type="text" value="04"/>
Father's Date of Birth:	<input type="text" value="10/15/1980"/>	Father's First Name Initial:	<input type="text" value="E"/>	Number in College:	<input type="text" value="1"/>
Mother's SSN:	<input type="text" value="231-07-7627"/>	Mother's Last Name:	<input type="text" value="ZENDER"/>		
Mother's Date of Birth:	<input type="text" value="10/15/1980"/>	Mother's First Name Initial:	<input type="text" value="C"/>		
Father's Highest Grade Level:	Blank <input type="radio"/> Elementary <input type="radio"/> High School <input checked="" type="radio"/> College <input type="radio"/> Unknown <input type="radio"/>				
Mother's Highest Grade Level:	Blank <input type="radio"/> Elementary <input type="radio"/> High School <input type="radio"/> College <input checked="" type="radio"/> Unknown <input type="radio"/>				
Email Address:	<input type="text"/>				

FAFSA Information page (3 of 4)

Parent Data - Financial Information

2009 Federal Benefits Received: SSI ☐ Food Stamps ☐ School Lunch ☐ TANF ☐ WIC ☐

Dislocated Worker: Blank ☐ Yes ☐ No ☒ Don't Know ☐

Tax Return Filed: Blank ☐ Already Filed/Completed ☐ Will File ☒ Will Not File ☐

Tax Form Used: Blank ☒ IRS 1040 ☐ IRS 1040A/EZ ☐ Foreign Tax Return ☐ U.S. Territory Tax Return ☐

Eligible For 1040A or 1040EZ: Blank ☐ Yes ☐ No ☒ Don't Know ☐

[Assumptions](#)

AGI: 66,997

U.S. Tax Paid: 6,129

Exemptions: 05

Father Income: 24,768

Mother Income: 40,453

Cash Savings: 500

Investment Net Worth: 36,000

Bus/Farm Net Worth: 0

Tax Deferred Pension:

Self Employment Payment:

Child Support Received:

Interest Income:

Untaxed IRA Distributions:

Untaxed Pensions:

Military Allowance:

Veterans Non-Ed Benefits:

Other Untaxed Income:

Educational Credits:

Child Support Paid:

Need-Based Employment:

Grant/Scholarship Aid:

Combat Pay:

Co-op Earnings:

Add. Financial Total: 0

Untaxed Income: 718

FAFSA Information (4 of 4)

Note. When you open an uncorrected ISIR, an Add (+) button is available. Click this button to insert a new row to make corrections.

Correction Status	Set the value to <i>Send</i> when the ISIR is ready to be sent to the CPS to request a corrected ISIR. Values include: <i>Accepted, Don't Send, Pending, Rejected, Send,</i> and <i>Sent.</i>
Status Date	The date the correction status was last modified.
EFC Status	The status displays as: <i>Unofficial, Official,</i> or <i>Rejected.</i>

Actual Bio/Demo Data

Actual Bio/Demo Data is the student's information stored in the Campus Community bio-demographic records and might differ from the information listed as ISIR Bio/Demo Data. To update actual information to match ISIR information, use the Campus Community bio/demographic data components.

Select the check box to send the corresponding fields to CPS for correction. When a corrected ISIR is requested, the system sends the selected fields to the CPS.

Correct Telephone	The field displays the active telephone number based on the phone usage setting on the Process Demo Setup page. If selected, the system displays the Ovrld check box. Select the Ovrld check box to override the telephone number to be sent to the CPS. From the list of options, select the student's active phone type to be sent to the CPS. The system then displays the alternate telephone number.
Correct Email	The field displays the active email address based on the Email usage setting on the Process Demo Setup page. If selected, the system displays the Ovrld check box. Select the Ovrld check box to override the email address to be sent to the CPS. From the list of options, select the student's active email type to be sent to the CPS. The system then displays the alternate email address.
Student Address	Click this link to view the student's active address.

ISIR Bio/Demo Data

The ISIR Bio/Demo Data column displays bio/demographic information reported on the ISIR record. Click the ISIR Address to view the original ISIR address.

Student Data – Enrollment Information

Select the enrollment status from Full Time, 3/4 Time, 1/2 Time, Below 1/2, and Not Sure.

Student Data – Background Information

State of Residence	Select the student's state of residence.
Res Prior nn (resident prior to 20nn)	The system displays the number representing the option selected. Values are <i>Blank</i> , <i>Yes</i> , and <i>No</i> .
Residency Date	Enter a date for the student's state residency.
Register with Sel Serv (register with Selective Service)	Select <i>Blank</i> or <i>Register Me</i> .

Degree/Certificate	<p>Values include:</p> <p><i>1st Bachelor Degree</i> (first bachelor degree).</p> <p><i>2nd Bachelor Degree</i> (second bachelor degree).</p> <p><i>Occ/Tech (Associate)</i> (occupational/technical (associate)).</p> <p><i>Associate General Ed</i> (associate general education).</p> <p><i>Cert <2 yrs</i> (certified less than two years).</p> <p><i>Cert ≥ 2 yrs</i> (certified at least two years).</p> <p><i>Tech Cred</i> (Technical credential).</p> <p><i>Grad/Prof</i> (Graduate/Professional).</p> <p><i>Other</i>.</p>
Current Grade Level	<p>Values are:</p> <p><i>1st yr NA</i> (never attended).</p> <p><i>1st yr AB</i> (attended before).</p> <p><i>2nd yr Sophomore</i></p> <p><i>3rd yr Junior</i></p> <p><i>4th yr Senior</i></p> <p><i>5th yr UG</i> (under graduate).</p> <p><i>1st yr GP</i> (graduate/professional).</p> <p><i>Grad/Prof+</i> (graduate/professional or beyond).</p>
HS Diploma or Equivalent (high school diploma or equivalency degree completed)	Select from <i>High school diploma</i> , <i>GED</i> , <i>Home schooled</i> , or <i>None of the above</i> .
Rcvd 1st Bach Deg By (Received First Bachelor Degree by date)	Select <i>Yes</i> or <i>No</i> .
Teacher Coursework	Select <i>Blank</i> , <i>Yes</i> , <i>No</i> , or <i>Don't Know</i> .
Work Study or Student Loans	Indicate the student's interest in student loans and work study.
Drug Conviction Affecting Elig (drug conviction affecting eligibility)	Indicate whether a drug conviction affects eligibility for any part of the year.

Student Data – Financial Information

Click the Assumptions link to access the Change Student Income Values page.

Change Student Income Values			
	Assumed Value	ISIR Value	Assumption Indicator
AGI:	0	4,686	Blank <input type="button" value="v"/>
U.S. Tax Paid:	0	88	Blank <input type="button" value="v"/>
Student Income:	0	4,686	Blank <input type="button" value="v"/>
Spouse Income:	0	0	Blank <input type="button" value="v"/>
Additional Financial Total:	0	3,000	Blank <input type="button" value="v"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>			

Change Student Income Values page

Use this page to override field values where the CPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS has used an alternate value.

Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Student Data – Dependency Status Information

Marital Status

You can change marital status in personal data or use this page to change the ISIR record. Information changed here does not change personal data information. This enables you to change the marital status to affect the EFC but does not change the marital status value in personal data. Values are:

Blank.

Single.

Married/Remarried.

Separated.

Divorced/Widowed.

Marital Status Date

Enter the date of the indicated marital status.

Marital Status (Personal Data)

The system displays the marital status listed in the Campus Community bio-demographic data records.

Dependency Status

The system displays the student's dependency status determined by the answers to the dependency status questions.

Citizenship Status

The system displays the citizenship status listed in the ISIR.

Click the Assumptions link to access the Change Student Status Values page.

Change Student Status Values			
	Assumed Value	ISIR Value	Assumption Indicator
DOB Before 1/1/1987:	2	No	Blank <input type="button" value="v"/>
Married:	2	No	Blank <input type="button" value="v"/>
Marital Status:	1	Single	Blank <input type="button" value="v"/>
Dependents:	2	No	Blank <input type="button" value="v"/>
Number in Family:			Blank <input type="button" value="v"/>
Number in College:			Blank <input type="button" value="v"/>
Citizenship Status:		1 Citizen	Blank <input type="button" value="v"/>
Children:			Blank <input type="button" value="v"/>
Unaccompanied Youth (School):	2	No	Blank <input type="button" value="v"/>
Unaccompanied Youth (HUD):	2	No	Blank <input type="button" value="v"/>
Risk of Homelessness:	2	No	Blank <input type="button" value="v"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>			

Change Student Status Values page

Use this page to override field values where the CPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Student Data – Independent Student Information

The system displays the Number in Family and Number in College for an independent student.

Parent Data – Background Information

Marital Status

You can change marital status in personal data or use this page to change the ISIR record. Information changed here does not change personal data information. This enables you to change the marital status to affect the EFC but does not change the marital status value in personal data. Values are:

Single/Divorced/Widowed

Married/Remarried

Separated

Marital Status Date

The system displays the marital status date reported on the FAFSA.

Click the Assumptions link to access the Change Parent Household Information page.

Change Parent Household Information			
	Assumed Value	ISIR Value	Assumption Indicator
Marital Status:		1 Mar/ReMar	Blank
Number in Family:		03	Blank
Number in College:		1	Blank
Father's SSN:	Y	609-55-5000	Assumption
Mother's SSN:	Y	609-55-5000	Assumption
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>			

Change Parent Household Information page

Use this page to override field values where the CPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Parent Data – Financial Information

Click the Assumptions link to access the Change Parent Earnings and Income Values page.

Change Parent Earnings and Income Values			
	Assumed Value	ISIR Value	Assumption Indicator
AGI:	0	66,997	Blank
U.S. Tax Paid:	0	6,129	Blank
Father Income:	0	24,768	Blank
Mother Income:	0	40,453	Blank
Additional Financial Total:	0	0	Blank
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>			

Change Parent Earnings and Income Values page

Use this page to override field values where the CPS has assumed an alternate value in their EFC calculation. You cannot edit fields in the component without first overriding the assumption indicator where the CPS has used an alternate value. Set the assumption indicator to *Reported* or *Verified* to enable the field to be corrected on the main page. *Reported* indicates you are entering data reported by the student and *Verified* indicates you have verified the data on the ISIR.

Correcting Assumptions and School Code Information

Access the Assumptions\School Codes page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, Assumptions\School Codes).

FAFSA Information		Assumptions\School Codes		EFC\DB Matches\Corr	
Zender, Catherine		ID: FA0332			
Aid Year: 2011 Financial Aid Year 2010 - 2011		Institution: PSUNV			
ISIR Data Find First 1 of 1 Last					
Effective Date:	09/01/2009	Transaction Nbr:	1	Correction Status:	
				Status Date:	
EFC Status:	Official	Primary EFC:	13,522	Prorated EFC:	13,522
				FM	IM
				Need Summary	INAS
Miscellaneous Information					
Dependency Override Indicator:		<input type="radio"/> Dependent To Independent <input type="radio"/> Cancel Dep Override-Corr Only <input type="radio"/> Override Failed			
Authorizing Institution:		Date Application Completed: 08/29/2009			
Preparers SSN:		<input type="checkbox"/> Preparers Signature			
Preparers EIN:		<input type="checkbox"/> Include Verify Fields <input type="checkbox"/> Adjusted EFC Calc Requested			
Application Signed By:		<input type="radio"/> Applicant <input checked="" type="radio"/> Applicant and Parent			
Owning School Cd:		001315 PeopleSoft University			
Student Data - Housing\School Code Information					
1st School Choice:	001328	UNIVERSITY OF SOUTHERN CALIFOR	Housing Code 1:	On Campus	
2nd School Choice:	001976	MOREHEAD STATE UNIVERSITY	Housing Code 2:	On Campus	
3rd School Choice:	001989	UNIVERSITY OF KENTUCKY	Housing Code 3:	On Campus	
4th School Choice:	001999	UNIVERSITY OF LOUISVILLE	Housing Code 4:	On Campus	
5th School Choice:	009275	NORTHERN KENTUCKY UNIVERSITY	Housing Code 5:	With Parent	
6th School Choice:			Housing Code 6:		
7th School Choice:			Housing Code 7:		
8th School Choice:	001315	UNIVERSITY OF CALIFORNIA (UCLA	Housing Code 8:	On Campus	
9th School Choice:			Housing Code 9:		
10th School Choice:			Housing Code 10:		

Assumptions\School Codes page (1 of 3)

Assumptions and Reject Overrides			
<input type="checkbox"/> Parent Nbr In College	<input type="checkbox"/> Student Nbr In College	<input type="checkbox"/> Reject Override N	<input type="checkbox"/> Reject Override A
<input type="checkbox"/> Parent AGI	<input type="checkbox"/> Student AGI	<input type="checkbox"/> Reject Override B	<input type="checkbox"/> Reject Override C
<input type="checkbox"/> Parent Add. Fin Total	<input type="checkbox"/> Student Add. Fin Total	<input type="checkbox"/> Reject Override W	<input type="checkbox"/> Reject Override G
<input type="checkbox"/> Reject Override J	<input type="checkbox"/> Reject Override K	<input type="checkbox"/> Reject Override 12	<input type="checkbox"/> Reject Override 3
<input type="checkbox"/> Reject Override 20			

FAA Information	
CPS Process Date:	11/04/2009
Institution Process Date:	11/21/2009
Date Application Received:	11/01/2009
Application Data Source Cd:	52 Paper Renw
Transaction Data Source Cd:	1A Elec App
Reprocess Code:	
Student IRS Request:	

Pell ID:	560-39-5339 RA 1
Duplicate SSN Code:	
CPS Pushed ISIR Flag:	
Rejected Status Change Flag	
ISIR SAR C Flag Changed:	
Verification Select Chng Flag:	
Special Circumstances Flag:	
Parent IRS Request:	

Assumptions/School Code (2 of 3)

Reject Reasons	
Reject Reason	Description

Comments	
Comment	Description
006	If you need to make corrections to your information, you may either make them online at www.fafsa.ed.gov , or by using this SAR. You must use your Federal Student Aid PIN to access your record online. If you need additional help with your SAR, contact your school's financial aid office or the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243). If your mailing address or e-mail address changes, you can make the correction online, send in the correction on your SAR, or call 1-800-4-FED-AID and ask a customer service representative to make the change for you.
112	Based on the information we have on record for you, your EFC is <EFC>. You are not eligible for a Federal Pell Grant but you may be eligible for other aid. Your school will use your EFC to determine your financial aid eligibility for other federal grants, loans, and work study, and possible funding from your state and school.
140	According to Social Security Administration (SSA) records, the Social Security Number (SSN) that was provided in Item 8 belongs to a deceased person. If the SSN in Item 8 is correct, the applicant must contact the SSA at 1-800-772-1213 or at www.socialsecurity.gov to resolve this problem. If the SSN is incorrect, the applicant must correct the SSN on a paper SAR or submit a new FAFSA online with the correct SSN.
156	If your parents have now completed their 2008 tax return, correct this SAR to reflect the income and tax information reported on their tax return. If your parents have not yet completed their tax return, you must correct this SAR to reflect the income and tax information reported on their tax return once it is filed.
157	If you have now completed your 2008 tax return, correct this SAR to reflect the income and tax information reported on your tax return. If you have not yet completed your tax return, you must correct this SAR to reflect the income and tax information reported on your tax return once it is filed.

Field Review	
ISIR Field Nbr	Description

Assumptions\School Codes page (3 of 3)

Miscellaneous Information

Dependency Override Indicator For professional judgement override of the students federal dependency status.

Authorizing Institution School that authorized a Dependency Status override.

Date Application Completed Display field.

Preparers SSN Displays social security number of the FAFSA preparer (if any).

Application Signed by Displays information about who signed the application.

Owning School Code Displays the code of the school processing the student's ISIR.

Student Data – Housing\School Code Information

School Choice	CPS school codes of the schools that have received a copy of the student's ISIR.
Housing Code	Student's intended housing status at the school of choice. Values include <i>Off Campus</i> , <i>On Campus</i> , and <i>With Parent</i> .

Assumptions and Reject Overrides

If a student omits an answer to a question or the answer is inconsistent, the CPS either assumes a response for the applicant or rejects the response. You can use this page to override this data. Select the check box to perform the override. Clearing the check box indicates no change and the override is not performed.

FAA Information

Special Circumstances Flag	<p>Displays a student's Special Circumstances Flag. A dependent student who has special circumstances can submit his or her FAFSA on the Web without parental income and asset information. An EFC is not calculated until the financial aid administrator determines that valid special circumstances exist and performs a dependency override. If valid special circumstances do not exist, the student must provide parental data in order to receive a calculated EFC. Values include:</p> <ul style="list-style-type: none"> • <i>1: Dependent record submitted without parental data.</i> • <i>2: Correction made to parental data.</i> • <i>3: Unaccompanied homeless individual.</i> • <i>4: Dependent record unsubsidized loans only.</i> • <i>Blank: Flag is not set.</i>
Student and Parent IRS Request fields	<p>Displays the outcome of the IRS Data Retrieval process. This process enables students and parents to transfer financial information from the IRS into their FAFSA on the Web application. Valid values include:</p> <ul style="list-style-type: none"> • <i>01 - IRS data request for the student/parent was sent to IRS</i> • <i>02 - IRS data for the student/parent was transferred from IRS and was not changed on the application by the user</i> • <i>03 - IRS data for the student/parent was transferred from IRS and at least one IRS data field was changed on the application by the user</i> • <i>04 - IRS data for the student was transferred from the IRS and on a correction entry at least one IRS data field was changed by the user</i> • <i>Blank - Flag is not set.</i>

Reject Reasons

Reject Reason Displays the reasons the CPS has rejected the ISIR record for the student. Students with rejected records must resolve the reject reason by making the corrections in the appropriate fields and submitting them for an official EFC.

Description Displays the reject reason description.

Comments

Comment The system displays comments. These comments may provide additional information or require attention. The comments assist you in determining whether corrections are required or whether follow up with the student is necessary.

Description The system displays the description of any comments.

Field Review

ISIR Field Nbr (ISIR field number) The system displays fields that the CPS requires the aid applicant to review for accuracy. On the student's printed SAR, these fields are clearly marked in boldface.

Description The system displays the description of any fields.

Viewing EFC Status and Database Matches

Access the EFC\DB Matches\Corr page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, EFC\DB Matches\Corr).

FAFSA Information		Assumptions\School Codes		EFC\DB Matches\Corr	
Zender, Catherine		ID:	FA0332		
Aid Year:	2011	Financial Aid Year	2010 - 2011		
		Institution:	PSUNV		
ISIR Data Find First 1 of 1 Last					
Effective Date:	09/01/2009	Transaction Nbr:	1	Correction Status:	
				Status Date:	+
EFC Status:	Official	Primary EFC:	13,522	Prorated EFC:	13,522
				FM	IM
				Need Summary	INAS
EFC Information					
Primary EFC:		13,522	Formula Type:		1
Secondary EFC:		0	Secondary EFC Type:		
Signature Reject EFC:					
		Prorated EFC:		13,522	Monthly EFC
		EFC Change Flag:			
		Dependency Status:		D DEP	
TI:	67,715	STI:	4,686	FTI:	72,401
ATI:	36,832	SATI:	2,792	AAI:	30,883
STX:	4,063	SIC:	947	APA:	44,600
EA:	2,800	SCA:	2,468	PC:	10,107
IPA:	18,850	PCA:	0	TSC:	0
AI:	30,883	CAI:	0	TPC:	10,107
		DNW:		-8,100	
		SDNW:		7,050	
		NW:		36,500	
		Calculated PC:		0	
		Calculated SC:		0	
		Calculated Prorated EFC:		0	

EFC\DB Matches\Corr page (1 of 2)

Database Matches/Flags

SSA Citizenship Indicator: A U.S. Citizen

Dept of Defense Match:

Selective Service Match:

DOD Parent Date of Death

Selective Service Registration:

NSLDS Match: 8 Transaction Not Sent

SSN Match:

NSLDS Transaction Nbr: 01

VA Match: 4 Active Duty

Verification Selection Ind: N

DHS Match:

Verification Tracking Flag:

DHS Verification Nbr:

Verification Type:

Secondary DHS Match Flag:

SAR C Flag:

Father's SSN Match: 4 SSN, Name, and DOB Match

Title IV Fund Eligibility: Y

Mother's SSN Match: 4 SSN, Name, and DOB Match

Federal PELL Eligibility:

Corrected / Verified Fields

Correction Source:

Corrected Fields

Find | View All First 1 of 1 Last

ISIR Field Nbr:

Code:

Verified Fields

Find | View All First 1 of 1 Last

ISIR Field Nbr:

Code:

EFC\DB Matches\Corr page (2 of 2)

EFC Information

The EFC page is designed to resemble the EFC information as it appears on the student aid report (SAR).

Formula Type	<p>The formula used to calculate the EFC determines whether the calculation includes income and assets or just income. The formula type is one of the following:</p> <ul style="list-style-type: none"> 1: Full Need Test Dependent. It uses regular methodology and includes assets and income from both the parent and student. 2: Full Need Test Independent without dependents. Parent assets and income are not used in the calculation. 3: Full Need Test Independent with dependents. Parent assets and income are not used in the calculation. 4: Simplified Dependent using the Simplified Needs Test (SNT). The student and parents do not have to provide asset data, only income. 5: Simplified Independent without dependents. 6: Simplified Independent with dependents. <p><i>Auto Zero EFC</i>: May also display as a Formula Type. Students can qualify for an Auto Zero EFC if their parents file a 1040A or 1040EZ, do not file a tax return, or have an income less than 12,000.00 USD. The parents do not have to file tax forms if they are recipients of AFDC or some other program and their income does not exceed 12,000.00 USD.</p>
EFC Change Flag	<p>Indicates whether the EFC value changed since the previous ISIR was generated. Values include:</p> <ul style="list-style-type: none"> 1: EFC Increase 2: EFC Decrease
Secondary EFC	<p>Calculated for students who qualify for the simplified or auto-zero EFC need analysis. If the student qualifies for the simplified or auto-zero EFC need analysis and provides asset data, the CPS calculates a second EFC. The secondary EFC is equal to or greater than the primary EFC.</p>
Secondary EFC Type	<p>An example of an EFC type is 1 Full Need Test Dependent. See the Formula Type field definition above for other values.</p>
Monthly EFC	<p>Click this link to view the Need Summary Monthly EFC page.</p>

The following fields display intermediate values derived from federal methodology used to calculate the expected family contribution: TI (total income), STI (student total income), FTI (FISAP total income), TSC (total student contribution), STX (state tax), IPA (income protection allowance), TPC (total parent contribution), SCA (student's contribution from assets), AI (available income), ATI (allowances against total income), EA (employment allowance), DNW (discretionary net worth), PCA (parents' contribution from assets), CAI (calculated available income), AAI (adjusted available income), SIC (student income contribution), and PC (parent contribution).

Corrected/Verified Fields

- Department of Defense (DOD) Match:** Match with the Department of Defense to determine if the applicant's parent was a member of the Armed Forces who died as a result of service in Iraq or Afghanistan after 09/11/01. Values include:
- *Y: Applicant's SSN included in the DOD Match file.*
 - *Blank: No match.*

DOD Parent Data of Death The date that the parent of the applicant died.

Corrected/Verified Fields

The system displays the Correction Source for the data, the ISIR Field Nbr (ISIR field number), and the associated Code. The Code indicates whether the field was corrected on this ISIR transaction or a previous ISIR transaction.

Viewing Need Summary Monthly EFC

Access the Need Summary Monthly EFC page (click the Monthly EFC link within the EFC Information group box on the EFC/DB Matches page).

Need Summary											
Monthly EFC											
	1	2	3	4	5	6	7	8	10	11	12
Primary:	04538	05661	06784	07907	09030	10153	11276	12399	13655	13788	13921
Secondary:	01188	02365	03542	04719	05896	07073	08250	09427	10741	10874	11007

Need Summary Monthly EFC page

On the previous pages, the system displays the 9 month EFC on the EFC\DB Matches\Corr page. The 9 month EFC does not display on the Need Summary Monthly EFC page.

To prorate EFC, the system differentiates between the non-standard term as the header—summer, fall, spring—and the non-standard term as a trailer—fall, spring, summer. This affects how the EFC is apportioned:

- If the non-standard term is the header, then the non-standard EFC uses the months at the beginning of the monthly EFC.
- If the non-standard term is the trailer, it uses the months at the end of the monthly EFC.

The system determines the non-standard term as header or trailer by evaluating FA Term. If a term has been set up on Valid Terms for Career as non-standard with term start and end dates and it appears on FA Term, a comparison occurs. If the non-standard term has a start date before the earliest start date of an academic term, the non-standard term is determined to be the header. Conversely, if the non-standard term has a start date after the earliest start date of an academic term, the non-standard term is determined to be the trailer.

See Also

See the U.S. Department of Education's manual, *Guide to SARS and ISIR* , for more information about resolution to database mismatches.

Processing Outbound Files

To send files out, you:

1. Run a process that moves all the outbound files to the outbound staging tables.
2. Run the process to create a flat file from the data in the staging tables.
3. Send the flat file to the CPS, using outbound file processes to send ISIR corrections, add institution requests, and FAFSA signature files.

This section discusses how to:

- Move records to outbound staging tables.
- Create outbound files for CPS.
- View outbound staging table files.
- View outbound staging table data.

Pages Used to Process Outbound Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR Corrections Export	RUN_CNTL_FAPCOR00	Financial Aid, File Management, ISIR Corrections, Process ISIR Corrections, ISIR Corrections Export	Run the Corrections Build process to create outbound files and place them in the ISIR staging tables. This process gathers Add Institution Requests, FAFSA signature, and ISIR Corrections records.
Batch Statistics	RUNCTL_FAPCOR00SEC	Click the Run Information button on the ISIR Corrections Export page.	Display information such as the correction file batch number, signature file batch number, and number of records exported for each batch the last time the export process was run.

Page Name	Definition Name	Navigation	Usage
FA Outbound	RUNCTL_FA_OUT	Financial Aid, File Management, Create Federal Data Files, FA Outbound	Create an external financial aid electronic commerce file.
ISIR Outbound Summary	ISIR_nn_OUTBOUND	Financial Aid, File Management, ISIR Corrections, View 20nn-20nn Outbound Files, ISIR Outbound Summary	View the batch files that are in the ISIR staging tables. You can verify that the FAPCOR00 process was successful if the batch is listed in this page.
ISIR Outbound Data	ISIR_CORR_HD_TEST	Financial Aid, File Management, ISIR Corrections, View 20nn-20nn Outbound Data, ISIR Outbound Data	View data for files that have been created or sent to the outbound staging table.
Correction Fields/Overrides	ISIR_CORR_A_SEC	Click the Correction Data link on the Outbound Staging Tables detail page, ISIR Corr A tab.	View detail information about ISIR Corrections A page.

Moving Records to Outbound Staging Tables

Access the ISIR Corrections Export page (Financial Aid, File Management, ISIR Corrections, Process ISIR Corrections, ISIR Corrections Export).

ISIR Corrections Export

Run Control ID: test [Report Manager](#) [Process Monitor](#) Run

ISIR Corrections Export

Find | View All First 1 of 1 Last

*Institution: PSUNV

*Aid Year: 2008

*School Code: 001315

Active ☒

+ -

*TG Number: 51234

☒ Process Corrections

☒ Process Add Institution

☒ Process ISIR Signatures

[Run Information](#)

Process Instance: 0

Run Date and Time:

Refresh
[Batch Message Print](#)

ISIR Corrections Export page

Active	Select to have the export process use the criteria chosen to send ISIR corrections to the CPS. If the check box is cleared, the export process ignores the criteria specified in that row. More than one row can be active at one time, which enables you to export ISIR corrections from more than one aid year.
TG Number	Enter the SAIG identifier for the academic institution.
Process Corrections	Select to export ISIR corrections that match the chosen institution, aid year, and school code.
Process Add Institution	Select this check box to export add institution requests that match the chosen institution, aid year, and school code.
Process ISIR Signatures	Select to export signature page information collected by your school that match the chosen institution, aid year, and school code.
Run Information	Click this link to access batch statistics, including the total number of records output for a given batch run.
Process Instance	Number assigned by the process scheduler representing the last time the ISIR correction export process ran without error.
Run Date and Time	Date and time of the process instance.
Refresh	Click the button to update the Process Instance and Run Date and Time fields.

- Batch Message Print** Click this link to create a text file containing the messages generated during the load process. The message file that is created for printing is called FAMSGPRT.LIS. Its location is based on the TEMP setting in the configuration manager.
- Run** Click this button to run the FAPCOR00 process from the process scheduler. When this process has completed successfully, the outbound files in the database move to the ISIR staging tables.

Creating Outbound Files for CPS

Access the FA Outbound page (Financial Aid, File Management, Create Federal Data Files, FA Outbound).

The screenshot shows the 'FA Outbound' page with the following elements:

- Run Control ID:** test
- Navigation links:** [Report Manager](#), [Process Monitor](#), and a yellow **Run** button.
- *Outbound File Path:** A text box containing the path \\ENC-ISIRSERVER\2008\ISIRCORR\
- *Outbound File Type:** A dropdown menu with 'ISIR Corrections' selected.
- *Aid Year:** A text box with '2008' and a magnifying glass icon.
- *Institution:** A text box with 'PSUNV' and a magnifying glass icon.

FA Outbound page

- Outbound File Path** Enter the location of the generated files. Make sure the application server has access to the file location.
- Outbound File Type** Select the file type of the files to be generated. The supported file types are listed with associated message class or output file name:
- ISIR Corrections, CORR0XIN.XXX
 - FAFSA Signatures, SIGS0XIN.XXX
 - Pell Origination - Phase-In, PGORxxIN
 - Pell Data Request, PGRQxxIN
 - Pell Disbursement - Phase-In, PGDRxxIN




The FA Outbound process selects records in the outbound staging tables and names the files in the appropriate message class. If multiple files of the same message class are generated, the file name extension is incremented to ensure uniqueness, such as CORR05IN.001. so that files are not overwritten.

Viewing Outbound Staging Table Files

Access the ISIR Outbound Summary page (Financial Aid, File Management, ISIR Corrections, View 20nn-20nn ISIR Outbound Files, ISIR Outbound Summary).

ISIR Outbound Summary

Outbound 10/11 ISIR Batch Summary

[Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

Outbound Batch Files

File Create Date/Time

EC Queue Instance	Batch Number		Record Type	Academic Institution	Aid Year	Award Year	Total Records
1	#C100131520100112125739	Detail	Corr/Dupe	PSUNV	2011	1011	1

ISIR Outbound Summary page

Click the Detail link to display all of the outbound staging table fields.

Viewing Outbound Staging Table Data

Access the ISIR Outbound Data page (Financial Aid, File Management, ISIR Corrections, View 20nn-20nn ISIR Outbound Data nn/nn).

Header	Isir Corr A	Isir Sign A
EC Transaction ID: CORR11IN EC Queue Instance: 1 Inbound / Outbound Switch: 0		
Header Information		
Record Type: H	Award Year: 1011	TG Number: TG51234
Create Date: 01/12/2010	Create Time: 125739	
ISIR Load Date/Time: 01/12/2010 12:57PM		
Trailer Information		
Record Type: H	Award Year: 1011	TG Number: TG51234
Create Date: 01/12/2010	Batch Indicator:	Create Time: 125739
Total Records: 1	Batch Number: #C100131520100112125739	

ISIR Outbound Data page

Use these pages to view data being sent for ISIR Correction & ISIR Signature files.

Processing Rejected ISIR Correction Files

Use the FASAREXX process to load ISIR Correction files that were rejected by the CPS. This section discusses how to:

- Load error files.
- Make corrections to rejected ISIR corrections.

Pages Used to Process Rejected ISIR Correction Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load ISIR Error File	RUNCTL_FASAREXX	Financial Aid, File Management, ISIR Corrections, Process ISIR Correction Errors, Load ISIR Error File	Evaluate record-level error files received from the CPS (CORE0XOP message class). If the file contains history (ISIR) correction errors, the process creates a matching Correction Management record for each rejected ISIR.
ISIR Correction Management	ISIR_CORRECT	Financial Aid, Federal Application Data, Manage Corrected ISIR Data, ISIR Correction Management	Make corrections to rejected ISIR Correction files.

Loading Error Files

Access the Load ISIR Error File page (Financial Aid, File Management, ISIR Corrections, Process ISIR Correction Errors, Load ISIR Error File).

Load ISIR Error File

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Find | View All First 1 of 1 Last

'Institution: PSUNV

'Aid Year: 2009

'TG Number: 51234

Active ☒

Input/Output file: WLSNT456\TESTDATA\IE06OP.DAT

Process Instance: 0

Run Date and Time:

Load ISIR Error File page

TG Number	Enter the Title IV WAN identifier for the academic institution.
Input/Output file	Enter the location of the Record Level Error Report file to process.
Active	Select to have the load process use the criteria chosen to load data from the CPS. If not selected, the load process ignores the criteria specified in that row. More than one row can be active at one time, which enables you to load data from more than one aid year.
Process Instance	Number assigned by the process scheduler representing the last time the ISIR Load process ran without error. Click the Refresh button to update.
Run Date and Time	Date and time of the process instance. Click the Refresh button to update.

Making Corrections to Rejected ISIR Corrections

Access the ISIR Corrections Management page (Financial Aid, Federal Application Data, Manage Corrected ISIR Data, ISIR Correction Management).

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ISIR Correction Management			
Suazo, John B		ID:	FA0600
Aid Year:	2005	Financial Aid Year 2004-2005	Institution: PSUNV
View			
<input checked="" type="radio"/> All Corrections <input type="radio"/> Rejected Only			
Corrections Batch Information			
Find View All First 1 of 1 Last			
Batch Nbr:	#C500131520041006175007	As Of Date:	06/28/2004
Submission Date:	10/06/2004	Sequence Number:	1
Batch Status:	Submitted	Transaction Nbr:	1
Correction Field(s)			
Find View All First 1 of 45 Last			
ISIR Field Nbr:	0016 Student's marital status	Action:	Pending
Old Value:	1	User:	SAMPLE
Submitted Value:	2		

ISIR Corrections Management page

Note. You can view all ISIR corrections initiated by the system in the ISIR Corrections Management component after the corrections export process is run.

To make corrections to rejected ISIR Correction files, do the following:

- Review the ISIR correction file on the ISIR Correction Management page.
 - In the Action field, select *Resubmit* for any field you want to resubmit or select *Delete/Ignore* to not resubmit a field.
 - Save the changes before exiting the page.
- Make any additional changes to ISIR fields from the ISIR Data Corrections component.
 - If required, call INAS to recalculate the EFC.
 - Set the correction status to *Send Correction(s)*.
 - Save the changes before exiting the component.
- Run the ISIR correction export process. A new ISIR correction record is created for the student. This correction record includes fields from the rejected ISIR corrections that have been marked as *Resubmit*, plus any new changes made in the ISIR data corrections pages. A new set of data representing the new ISIR correction record is created in the ISIR correction management page. The rejected ISIR correction file updates to indicate a new batch status of *Reprocessed*.

View

All Corrections	Select to view all ISIR corrections
Rejected Only	Select to view rejected corrections.

Corrections Batch Information

Batch Nbr (batch number)	The batch number is used to match corrected ISIR records to the appropriate corrections. This is generated when the FAPCOR00 process runs.
Submission Date	Indicates the date the request was submitted.
Batch Status	<p>Values include:</p> <p><i>Reprocessed:</i> the ISIR correction file is sent back to the CPS with the corrections made in the erred fields.</p> <p><i>Resubmit:</i> only correction fields with an action of resubmit are sent.</p> <p><i>Rejected:</i> indicates the ISIR correction file was rejected by the CPS and needs to be corrected.</p>
Sequence Number	The system displays how many inserted rows of data exist for the first transaction.
Transaction Nbr (transaction number)	The system displays the number of records that exist for a student from the CPS.

Correction Field(s)

ISIR Field Nbr (ISIR field number)	Displays the SAR field name and field description.
Old Value	Displays the original data.
Submitted Value	Displays the correction.
Action	Select <i>Delete/Ignore</i> as the action if you do not want the correction field to be included when the new ISIR corrections file is created.
User	Displays the user name.

Working with ISIRs

This section discusses how to:

- Add your institution to a student's ISIR.
- Send FAFSA signature receipt information.
- Use the batch message print page.

Pages Used to Work with ISIRs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR Add School	ISIR_ADD_SCHOOL	Financial Aid, File Management, ISIR Corrections, Modify ISIR School Recipients, ISIR Add School	Add your institution to a student's ISIR. Submit this request to the CPS to request a student's ISIR data to send to your institution's destination point.
FAFSA Signature	ISIR_SIGNATURE	Financial Aid, File Management, ISIR Corrections, Enter FAFSA Signatures, FAFSA Signature	Enter signature page information collected from students in preparation for transmission to the CPS.
Batch Message Print	BTCH_MSG_INQ_RUN	Financial Aid, Print Batch Process Messages, Batch Message Print	View information gathered by the Batch Message page.

Adding Your Institution to a Student's ISIR

Access the ISIR Add School page (Financial Aid, File Management, ISIR Corrections, Modify ISIR School Recipients, ISIR Add School).

ISIR Add School			
Jaishree Pandey		FA0614	
Add School Information			
User ID:	PS	Process Status:	
School Cd:	001008	ATHENS STATE UNIVERSITY	Process Date:
*Institution:	PSUNV	PeopleSoft University	Request Date: 03/19/2007
*Aid Year:	2008	Financial Aid Year 2007 - 2008	
DRN:	0000	*Original SSN:	<input type="text"/>
*Trans Nbr:	<input type="text"/>	*Name CD:	<input type="text"/>
*Sch Pos:	Rplc Sch 6	<input type="checkbox"/> Request ISIR from CPS	

ISIR Add School page

DRN (date release number) Enter the student's date release number.

Trans Nbr (transaction number) Enter the transaction number for the student aid report (SAR).

Sch Pos (school position) Enter the school position number, from 1-10. The FAFSA allows a student to request information to be sent to up to six institutions. You can place your request in the automatic ISIR Request process.



Original SSN Enter the student's original Social Security Number.

Name CD (name code) Enter the first two letters from the student's last name.

Request ISIR from CPS Select this option to include this request in the automatic ISIR request process.

Sending FAFSA Signature Receipt Information

Access the FAFSA Signature page (Financial Aid, File Management, ISIR Corrections, Enter FAFSA Signatures, FAFSA Signature).

FAFSA Signature			
Jaishree Pandey		FA0614	
Signature Information			
User ID:	PS	Request Date:	03/19/2007
Institution:	PSUNV PeopleSoft University	Process Date:	
Aid Year:	2008 Financial Aid Year 2007 - 2008		
School Cd:	001014  DANIEL PAYNE COLLEGE		
*Original SSN:	<input type="text"/>		
*Name CD:	PA		
Signed By:	Applicant Only 		
<input type="checkbox"/> Submit Signature to CPS			

FAFSA Signature page

User ID	Displays the user who entered the signature page information.
Original SSN (original Social Security Number)	The original Social Security Number entered on the FAFSA by the student.
Name Code	The first two letters of the student's last name reported on the FAFSA used in conjunction with the original SSN by the CPS to uniquely identify the student.
Signed By	<p>Select the person who signed the FAFSA signature page. Values are:</p> <p><i>Applicant Only:</i> Only the student signed.</p> <p><i>Applicant and Parent:</i> Both the student and the student's parent signed.</p> <p><i>Parent Only:</i> Only the student's parent signed.</p>
Submit Signature to CPS	Select when the record is ready to be transmitted. When the correction export program processes the record, the check box is cleared and the Process Date field becomes set. You can resubmit the FAFSA Signature records by selecting the check box.
Request Date	Displays the date the user enters signature page information into the system.
Process Date	Displays the date when the information is sent to the CPS.

Using the Batch Message Print Page

Access the Batch Message Print page (Financial Aid, Print Batch Process Messages, Batch Message Print).

Batch Message Print

Run Control ID: ISIR [Report Manager](#) [Process Monitor](#) [Run](#)

Message Search Criteria: ☒ Use Latest Process Instance ☐ Use Other [Retrieve Messages](#)

Display Messages			
Customize Find View All First 1 of 1 Last			
	Last Update DateTime	Message Text	More
1			More

Batch Message Print page

Select a Process Name. The ISIR suspense load (FAPSAR00) process and ISIR corrections build (FAPCOR00) process generate messages.

Deleting ISIR and NSLDS Information

You can use the ISIR/NSLDS Records component to do the following:

- Delete a previously loaded ISIR to load a new ISIR for the student.

When a new official ISIR suspends because of a conflict with a previously loaded and rejected ISIR, delete the first ISIR. After you delete the rejected ISIR, the system allows the new official ISIR to load.

- Delete an ISIR that loaded to the wrong student.

An ISIR can load to the wrong student due to the sensitivity of the search match criteria or an ISIR can be manually assigned to the incorrect student online. If the student has already been awarded financial aid, verify that the calculated EFC and database match information is still accurate after the incorrect ISIR/NSLDS information is removed.

However, this component does not support deleting NSLDS records that were loaded from the NSLDS FAT load process. Deleting such data creates orphan data in the database and does not reset any calculated need information. The summary need information on the Packaging Status Summary and Awards page is stored in PS_STDNT_AWD_PER and is updated when an ISIR loads.

The component also does not correct ISIR database match and verification selection information loaded into the PS_STDNT_AID_ATRBT record from the ISIR, which you can view in the Packaging Status Summary component. You must either load a new ISIR to synchronize the data or manually reset/override the information on the Packaging Status Summary component using the ISIR Data Corrections Database Match page as your source data.

If you delete one, but not all related ISIR data correction rows, the correct ISIR audit information is not preserved. For example, if three rows of effective-dated ISIR data exist for the same transaction number, and you delete only one row, you lose all of the ISIR audit information.

Warning! Please restrict access to this component to staff members with the knowledge and authority to delete student ISIR information from the database. Incorrectly deleted or modified information can create data integrity errors in your database, or adversely affect downstream processes.

This section discusses how to:

- Delete ISIR records.
- Delete NSLDS records.

Pages Used to Delete ISIR and NSLDS Information

Page Name	Definition Name	Navigation	Usage
ISIR Delete	ISIR_DELETE	Financial Aid, File Management, ISIR Import, Delete ISIR/NSLDS Records, ISIR Delete	Delete incorrectly loaded ISIR records from the application tables so that correct ISIR information can be loaded for the student.
Nsls Delete	NSLDS_DELETE	Financial Aid, File Management, ISIR Import, Delete ISIR/NSLDS Records, Nsls Delete	Delete NSLDS records that were loaded from an ISIR record and to modify the effective date of previously loaded ISIR NSLDS historical data.

Deleting ISIR Records

Access the ISIR Delete page (Financial Aid, File Management, ISIR Import, Delete ISIR/NSLDS Records, ISIR Delete).

ISIR Delete		Nsls Delete					
Chris Kidston		ID:	FA0616				
Aid Year:	2008 Financial Aid Year 2007 - 2008	Institution:	PSUNV				
Delete Selected ISIR(s)							
Customize Find View All First 1-2 of 2 Last							
	Delete ISIR	Eff Date	Sequence	Trans Nbr	NSLDS Txn	App Date	ISIR Input Record Type
1	<input type="checkbox"/>	02/26/2007	1	1	01	11/17/2006	
2	<input type="checkbox"/>	11/20/2006	1	1	01	11/17/2006	

ISIR Delete page

Each row in the grid represents an effective-dated row in the ISIR Data Corrections component. All related ISIR rows have the same transaction number.

Delete ISIR Select to mark a row to delete.

Eff Date (effective date)	The effective date for the data row on the ISIR Data Corrections component.
Sequence	This is a database table key value.
Trans Nbr (transaction number)	The ISIR transaction number.
NSLDS Txn (NSLDS transaction number)	This transaction number is used like the ISIR transaction number. When it is used in increments, it indicates that the NSLDS information on the ISIR has been revised.
App Date (application date)	Date the CPS received the FAFSA application.
ISIR Input Record Type	ISIR transaction data source.
Delete Selected ISIRs	Click this button to delete the rows from the grid that you selected. If you save the page changes, the data is permanently deleted from the database and cannot be viewed in the ISIR Data Corrections component.

After you delete ISIR data, you must do the following:

1. Use the ISIR Data Corrections component to verify that the data is deleted.
2. Review and recalculate need summary information that displays in the packaging status summary and awarding pages. If data still exists in the ISIR Data Corrections component, recalculate the need. If you are loading new ISIR data, make sure that an INAS calculation performs after the ISIR loads.
3. Review and correct ISIR database match and verification selection information. Loading a new ISIR synchronizes the data. If you do not load a new ISIR, manually reset/override the information on the Packaging Status Summary component using the current ISIR Data Corrections component, Database Match page, as the source data.
4. Verify that the appropriate ISIR audit information is deleted.

Database tables affected by the ISIR delete include:

- PS_ISIR_COMPUTED
- PS_ISIR_CONTROL
- PS_ISIR_INTERPRET
- PS_ISIR_PARENT
- PS_ISIR_STUDENT
- PS_ISIR_COMMENTS
- PS_ISIR_FLD_REVIEW
- PS_ISIR_FLD_CORR
- PS_ISIR_REJ_REASON
- PS_AUDIT_ISIR_CHNG where ISIR_TXN_NBR equals deleted ISIR

Deleting NSLDS Records

Access the Nslds Delete page (Financial Aid, File Management, ISIR Import, Delete ISIR/NSLDS Records, Nslds Delete)..

Chris Kidston ID: FA0616
 Aid Year: 2008 Financial Aid Year 2007 - 2008 Institution: PSUNV

NSLDS Data Find | View All First 1 of 1 Last

NSLDS Transaction Nbr: 1 NSLDS Transaction Source: Last Updated: 02/23/2007

	Effective Date	Effective Sequence	ISIR Source Year	Translate Long Name	Transaction Process Date
1	02/23/2007	1	08	ISIR	11/20/2006
2	03/23/2006	1	07	ISIR	11/08/2005
3	01/13/2005	1	06	ISIR	11/04/2003
4	06/28/2004	1	05	ISIR	11/04/2003
5	11/23/2002	1	04	ISIR	11/19/2002

Nslds Delete page

Warning! The NSLDS Delete page is not designed to delete all NSLDS FAT information. If you delete information loaded from the NSLDS FAT load process, the system creates orphan data.

This page consists of two scroll areas. The outer scroll area displays high-level status information of the student's NSLDS history record. The inner scroll area displays information on individual NSLDS records that were loaded from the student's ISIR or the NSLDS transcript file. You can delete the student's entire history or only the most recent set of loaded NSLDS information.

NSLDS information does not always load with an ISIR. To identify the NSLDS information you want to delete, match the effective date and NSLDS transaction number on the ISIR delete page with the NSLDS transaction number and transaction process date with the correct ISIR source year value on the Nslds Delete page. These date fields match unless you use the current date as the effective date feature on the ISIR Data Load Params, or manually override the ISIR effective date when the ISIR loaded.

If you override the effective date when loading ISIRs, use the ISIR Data Corrections component to compare the transaction process date to match the NSLDS data with the ISIR.

To delete every row in the grid, you delete the entire NSLDS history for the student by deleting information from the outer scroll area. Select any field in the area controlled by the outer scroll bar and delete the row.

To delete only part of the student's NSLDS history, such as data from the last ISIR, do the following:

1. Delete the appropriate row in the grid.
2. Update the NSLDS transaction number, transaction source, and last updated fields with the matching information from the current effective-dated row in the grid.
3. Set the last updated date to match the effective date value. This synchronizes the data viewed in the NSLDS inquiry page.

NSLDS Transaction Nbr (NSLDS transaction number)	<p>The NSLDS transaction number that was the source of the last update to the NSLDS history.</p> <p>Deleting data at this scroll level deletes the entire NSLDS data structure.</p> <p>Do not delete if the transaction source is <i>F</i>, Financial Aid Transcript.</p>
NSLDS Transaction Source	<p>The source of the last update of the student's NSLDS information. The sources are:</p> <p><i>A</i>: NSLDS Transfer Alert</p> <p><i>I</i>: ISIR load</p> <p><i>F</i>: Financial Aid Transcript</p> <p><i>H</i>: NSLDS FA History.</p> <p><i>M</i>: Manual</p>
Last Updated	The date the NSLDS transaction source process updated the NSLDS tables.
Effective Date	The date that the NSLDS data was entered into the database. This is usually the same date that the ISIR data loaded.
Effective Sequence	This is a database table key value.
ISIR Source Year	Indicates the aid year of the source record.
Transaction Process Date	<p>The date the CPS (ISIR) or NSLDS (FAT) processed the data record that loaded.</p> <p>For ISIR source data, this date is the default effective date used when loading the ISIR into the ISIR Data Corrections component.</p>

The following tables are affected by an NSLDS delete:

- PS_NSLDS_GEN
- PS_NSLDS_FAT_AGGR
- PS_NSLDS_ISIR_DTL
- PS_NSLDS_PELL
- PS_NSLDS_OVRPYMNT
- PS_NSLDS_NAME_HIST
- PS_NSLDS_ACG
- PS_NSLDS_SMART

Viewing ISIR History

Use the ISIR History Inquiry component to view ISIR and need analysis information. This component displays all ISIR fields across all aid years. Fields that are not valid in a particular aid year appear as blank or zero.

Note. Some ISIR fields the literal field value, but no text description, because the text descriptions change from one aid year to another.

See Also

The EDE Technical Reference

Pages Used to View ISIR History

Page Name	Definition Name	Navigation	Usage
FAFSA Information	ISIR_PIA_HIST1	Financial Aid, Financial Aid History, View Archived Application Data, ISIR History, FAFSA Information	Review ISIR data. Includes student bio/demo data, enrollment information, background information, financial information, dependency status, and parent background and financial data.
Address Use	ISIR_ADR_MNT_SEC	Click the Student Address link on the FAFSA Information page.	Review student active address.
Original ISIR Address	ISIR_ORG_ADR_SEC	Click the ISIR Address link on the FAFSA Information page.	Review student original ISIR address.
Student Income Values	ISIR_ASM_ST1_H_SEC	Click the Assumptions link in the Student Data - Financial Information group box on the FAFSA Information page.	Review student income.
Student Values Status	ISIR_ASM_ST2_H_SEC	Click the Assumptions link in the Student Data - Dependency Status Information group box on the FAFSA Information page.	Review student household information.

Page Name	Definition Name	Navigation	Usage
Parent Household Information	ISIR_ASM_PR2_H_SEC	Click the Assumptions link in the Parent Data - Parent Background Information group box on the FAFSA Information page.	Review parent household information.
Parent Earnings and Income Value	ISIR_ASM_PR1_H_SEC	Click the Assumptions link in the Parent Data - Parent Financial Information group box on the FAFSA Information page.	Review parent income and earnings.
Assumptions/School Codes	ISIR_PIA_HIST2	Financial Aid, Financial Aid History, ISIR History, Assumptions/School Codes	Review miscellaneous information, housing school code information, assumptions and reject overrides, reject reasons, and comments.
EFC\DB Matches\Corr	ISIR_PIA_HIST3	Financial Aid, Manage Financial Aid History, ISIR History, EFC\DB Matches\Corr	Review EFC information, database matches flags, and corrected fields.

Viewing ISIR Reports

This section lists ISIR reports and discusses how to use the ISIR Reject/Assumption Report.

Pages Used to Produce ISIR Reports

Page Name	Definition Name	Navigation	Usage
ISIR Assumption/Reject Ovr (ISIR assumption/reject override)	RUNCNTL_FAISRJAS	Financial Aid, File Management, ISIR Import, CPS Reject/Assumption Report, ISIR Assumption/Reject Ovr	List students who have assumptions or rejects that have no respective overrides and students who have overrides made but no assumptions or rejects. Use this list to identify students for whom you need to apply assumption overrides manually. This report is not aid-year specific.

Page Name	Definition Name	Navigation	Usage
System Generated ISIR Report	SFA_RUNCTL_FA928	Financial Aid, File Management, ISIR Import, CPS Reject/Assumption Report, System Generated ISIR Report	Identify why a system generated ISIR record was created before loading system generated ISIR files. Suspend all system generated files before running this report to cause the student's ID to be determined and printed on the report.
ISIR Suspense Detail Report	SFA_RUNCTL_FA927	Financial Aid, File Management, ISIR Import, ISIR Suspense Detail Report	List all ISIRs that suspended or are set to error by the ISIR Load program. Data on the report derives from the ISIR Suspense Management page.
ISIR Batch Load Summary Report	RUNCTL_FA914	Financial Aid, File Management, ISIR Import, ISIR Load Summary Report, ISIR Batch Load Summary Report	Create a summary of all ISIR batch loads, with status for each ISIR in each batch. Run weekly to accumulate ISIR load statistics.
Review ISIR Correction Audits	ISIR_CORR_AUDITS=	Financial Aid, Federal Application Data, View ISIR Field Audits	Review ISIR correction audits.

Using the ISIR Reject/Assumption Report

Use the ISIR Reject/Assumption Report to identify any current, loaded ISIR where specific CPS generated field value assumptions or reject codes have been issued. The report lists any assumed values for the following fields: Parent number in college, Parent AGI, Parent Worksheet C total, Student number in college, Student AGI, and Student Worksheet C total. The following reject codes are also listed: *B*, *N*, and *W*.

Consider the following scenario: A second ISIR transaction is loaded into the system that corrects assumed or rejected values on the original ISIR. If you then run INAS, INAS can incorrectly calculate the student's EFC because INAS does not suppress the assumption as the CPS does. Instead, INAS invokes assumptions based on INAS specifications.

For example, a student's first ISIR has an assumed value for the parent's Worksheet C amount. You then receive and load a second ISIR for the student that confirms the initially reported value. When you then run INAS, the student's EFC calculation may be incorrect. To avoid this, set an assumption override manually for the student on the Assumption Overrides panel so that INAS suppresses the assumption. Process the assumption/rejects by using the ISIR Assumption and Reject override fields on the ISIR Data Corrections panel group.

The system continues to select ISIR records on the report until the following occurs:

- Records selected because of an assumed value have the corresponding assumed indicator field value set to verified or reported through the verification process or manually in the ISIR Data Corrections panel group.
- A new ISIR with no assumptions or rejects is loaded.
- Reject overrides have been set for records with reject codes.

Note. Because several INAS assumptions can occur against the fields used by the report, the system may select records where using the Assumption Override fields is not be the appropriate action to resolve the EFC calculation.

Reviewing ISIR Correction Audits

Access the Review ISIR Correction Audits page (Financial Aid, Federal Application Data, View ISIR Field Audits).

Review ISIR Correction Audits

Davi,Duarte
ID: FA0335

Aid Year: 2010 Financial Aid Year 2009 - 2010
Institution: PSUNV

ISIR Correction Audits

Find | View All First 1-3 of 8 Last

Transaction Nbr:	1	Status:	Pending
User ID:	PS	Date/Time:	09/08/08 4:00:54AM
Field Number:	0090	Field Descr:	Student Number in Family
Record:	ISIR_STUDENT	Field Name:	NUM_FAMILY_MEMBERS
Old Value:		New Value:	01

Transaction Nbr:	1	Status:	Pending
User ID:	PS	Date/Time:	09/08/08 4:00:54AM
Field Number:	0091	Field Descr:	Student Number in College
Record:	ISIR_STUDENT	Field Name:	NUMBER_IN_COLLEGE
Old Value:		New Value:	1

Transaction Nbr:	1	Status:	Pending
User ID:	PS	Date/Time:	09/08/08 4:00:30AM
Field Number:	0018	Field Descr:	Student State of Residence
Record:	ISIR_STUDENT	Field Name:	STATE_RESIDENCE
Old Value:	CA	New Value:	CN

Review ISIR Correction Audits page

The system displays the User ID of the person who made the change, Date/Time, Transaction Nbr (transaction number), the field name of what changed, the original data Old Value, and the changed data New Value. The Status field indicates whether the field change has been submitted for correction with the CPS.

Chapter 23

Processing and Using Institutional Financial Aid Applications

This chapter gives an overview of the management and processing of institutional financial aid application data, including College Board PROFILE and Need Access electronic data that is loaded into the system using an auto load process.

This chapter describes how to:

- Maintain institutional financial aid applications.
- Load and manage PROFILE processes.
- Load and manage Need Access processes.
- Use PROFILE suspense management.
- Review institutional correction audits.
- Use Need Access suspense management.

Maintaining Institutional Financial Aid Applications

Your institution can gather additional resource information about students and their families by using the College Board PROFILE application and the Need Access application, which are electronically supported by Financial Aid or by entering your institutional application on the pages in this component.

Note. The College Board PROFILE, Need Access, and institutional application data share the same pages. You might unintentionally create multiple institutional aid records for a student from these three sources, which could cause unintended INAS calculation results.

Note. Question marks or blanks on College Board PROFILE or Need Access data files are converted or appear as zeros in currency based numeric fields.

This section lists common elements and discusses how to:

- Review student information.
- Review parent information.
- Review currency information family information, and institutional questions.
- Review all computed data for student and parents.

See Also

Chapter 23, "Processing and Using Institutional Financial Aid Applications," Loading and Managing PROFILE Processes for the 2009–2010 Aid Year, page 687

Chapter 23, "Processing and Using Institutional Financial Aid Applications," Loading and Managing Need Access Processes, page 700

Chapter 24, "Processing INAS," Using INAS Batch Calculations, page 764

Common Elements Used in This Section

Need Summary	Click to access the Need Summary page, where you can review the student's federal and institutional need calculations.
FM (federal methodology)	Click to access the INAS Fed Extension page, where you can override INAS Local Policy Options for federal data.
IM (institutional methodology)	Click to access the Institutional Need Calculation Extension 1 page, where you can override INAS Local Policy Options for institutional data.
INAS (institutional need analysis system)	Click to calculate an unofficial federal and institutional Expected Family Contribution (EFC) by using the College Board's Institutional Need Analysis System (INAS). A COBOL program is used to perform the INAS calculation.

See Also

Chapter 24, "Processing INAS," Defining Federal and Institutional Methodologies, page 709

Chapter 24, "Processing INAS," Overriding Expected Family Contribution (EFC), page 749

Pages Used for Institutional Applications

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years with valid INAS calculations. Earlier aid year institutional application data is available for display only at Financial Aid, Financial Aid History, View Archived Application Data, Institutional Application.

Page Name	Definition Name	Navigation	Usage
Student Data	INST_STUDENT_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data	View or enter all the information about the student.

Page Name	Definition Name	Navigation	Usage
Parent Data	INST_PARENT_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data	View or enter all the parent information.
Miscellaneous Data	INST_MISC_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data	View or enter signature, family member, school selection, and institutional question (the College Board PROFILE Section Q) information. You can also view FNAR messages on this page.
Computation Data	INST_COMP_SUMM_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Data	View or enter computed parent and student income, allowance, and asset information using your institutional and federal methodology. The computed values appear here.

Reviewing Student Information

Access the Student Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data).

Student Data	Parent Data	Miscellaneous Data	Computation Data
OSWEGO,JONAH		ID: 1007	Institution: PSUNV Need Summary
Dependency Status: Dependent		Source: Profile	Aid Year: 2011 FM IM INAS
Bio/Demo and Citizenship Data			
National ID:	999-99-9999	CSS ID:	3666999
Birthdate:	12/25/1988	Date Loaded:	10/07/2009
Marital Status:	Unknown	Date Application Received:	
US Citizenship Status:	Native	Fee Waiver:	Yes
Reported Country:		AP-Flag:	
Reported Status:	U.S CITIZEN	Foreign Address Indicator:	N
Bio/Demo Citizenship Status		Application Type:	1
		Lowest Income Filer:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Student's Information			
Legal Residence:	VA <input type="button" value="v"/> Virginia	Year in School:	1st yr Never Attended <input type="button" value="v"/>
Mailing State:	VA <input type="button" value="v"/> Virginia	Financial Aid Status:	First-time App, New Student <input type="button" value="v"/>
Postal:	22003	Marital Status:	Single <input type="button" value="v"/>
Natural Parent Status:	Married <input type="button" value="v"/>	Email Address:	alpha1@alpha.com
Most Support:	<input type="button" value="v"/>	Veteran:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
Student Lives With:	<input type="button" value="v"/>	Orphan/ Ward:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
Number in Family:	<input type="text"/>	Dependents:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
Number in College:	<input type="text"/>		

Student Data page (1 of 3)

Student's Income and Benefits

Tax Filed Status:Completed

Tax Form Type:1040

Number of Exemptions:12

Adjusted Gross Income:4,500

US Tax Paid:180

Hope Lifetime Learning Credit:0

Itemized Deductions:0

Dislocated Worker:

No

No

Yes

Orphan/Foster/Ward after 13:

No

No

Yes

Means Tested Benefits:

No

No

Yes

Homeless:

No

No

Yes

Student's Earnings:4,500

Spouse's Earnings:0

Dividend/Interest:630

Social Security Benefits:0

Combat Pay:0

Welfare TANF:0

Child Support Received:0

Earned Income Credit:0

Other Untaxed Income:450

Taxable Financial Aid:1,850

Student's Assets

Cash, Savings, and Checking:1,450

IRA/ Keogh:0

Self Employed:

No

No

Yes

Student Lives on Farm:

No

No

Yes

FTE Employess Greater Than 100:

No

No

Yes

Investment:00

Home:00

Home Purchase Year:0Price:0

Other Real Estate:00

Business/Farm:00

Student Data page (2 of 3)

Student's Trust Information		Student's Expenses	
Value of Trust Fund:	<input type="text" value="0"/>	Child Support Paid:	<input type="text" value="0"/>
Trust Established by:	<input type="text" value="v"/>	Medical/Dental:	<input type="text" value="0"/>
Trust Available:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/R		
Student's Expected Resources			
Veterans Benefits:	<input type="text" value="3,480"/>	Months:	<input type="text" value="12"/>
VA Benefits Received Code	<input type="text" value="2"/>		
	Summer	Award Year	
Student's Earnings:	<input type="text" value="1,450"/>	<input type="text" value="4,050"/>	
Spouse's Earnings:	<input type="text" value="0"/>	<input type="text" value="0"/>	
Other Taxable Income:	<input type="text" value="0"/>	<input type="text" value="0"/>	
Untaxed Income:	<input type="text" value="0"/>	<input type="text" value="0"/>	
	Award Year		
Grant/Scholarship:	<input type="text" value="1,000"/>		
Tuition Benefits:	<input type="text" value="0"/>		
Parent(s) Contribution:	<input type="text" value="0"/>		
Relative's Contributions:	<input type="text" value="0"/>		
Receive Tuition Benefits:	<input type="radio"/> Yes <input type="radio"/> No		
Agencies/ Foundation Support:	<input type="radio"/> Yes <input type="radio"/> No		
Government Support:	<input type="radio"/> Yes <input type="radio"/> No		

Student Data page (3 of 3)

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Bio/Demo and Citizenship Data

The data for the fields in this group box are populated from Campus Community Bio/Demo data.

NID (National ID)	Indicates the student's National ID.
<p>Note. PROFILE supports the loading of an International PROFILE Application Type, and PROFILE-related tables may reflect the National ID (NID) of a foreign student. During the PROFILE Data Load, the system tests if the student's NID meets the format rules defined for the specified country. If the NID meets the test, then a row is inserted into Person Data with the NID and NID Country. If the NID does not meet the test, then a row is inserted into Person Data with the NID Country and that country's default NID.</p>	
Birthdate	Indicates the student's date of birth.
Marital Status	Indicates the student's marital status.
US Citizenship Status	Displays the citizenship status for a US student.
Reported Country	Displays country if not United States of America.
Reported Status	Displays the reported citizenship status, which can be <i>U.S CITIZEN</i> , <i>ELIG NON-CITIZEN</i> , or blank

Bio/Demo Citizenship Status	Click this link to access the Campus Community Citizenship/Passport page to confirm the citizenship status of the student's Biographic/ Demographic data against the values in the Reported Country and Reported Status fields.
CSS Data	
CSS ID	Displays the student's unique identifying number assigned by College Board to ensure both privacy and quick retrieval of records. When you call the College Board inquiry number with questions about specific records, it is helpful to know the student's College Board ID number.
Date Loaded	Displays the date the College Board application was loaded into the system.
Date Application Received	Displays the date the application was received by College Board.
Fee Waiver	Displays <i>Yes</i> or <i>No</i> .
AP Flag	Displays a <i>Y</i> value from PROFILE only if student passed two or more AP classes with a test grade of 3 or higher. This field is blank if no information is available, the student does not give permission for information to be passed, or the student does not qualify for a <i>Y</i> value.
Foreign Address Indicator	Displays <i>Y</i> if the student has a foreign address. Displays <i>N</i> if the student does not have foreign address.
Application Type	Displays <i>1</i> if the application is a Domestic PROFILE and <i>4</i> if the application is an International PROFILE Note: <hr/> Note. The following Application Types are not loaded into the system: 2 = Noncustodial PROFILE and 3 = Registration only record <hr/>
Lowest Income Filer	Displays status identifying lowest income filers.

Student's Information

Legal Residence	Select the legal resident of the student. Values include US states, Canada (CN), or Mexico (MX).
Mailing State	Select the U.S. state in which the student is a resident.
Postal	Enter the postal code or zip code for the student's state of residence.
Natural Parent Status	Optional. Select from <i>Married, Separated, Divorced, Never Married Living Separate, Never Married Living Together, or Widowed</i> .
Most Support	Select from: <i>Father</i> or <i>Mother</i> .

Lives With	Select from: <i>Blank, Father, Mother, or Neither.</i>
Number in Family	Enter the total number of people in the student's household. The system displays 01 through 99 and blank for dependent students.
Number in College	Enter the total number of people in college from the student's household. The system displays 1 through 9 and blank for dependent students.
Year in School	Enter the academic year for which the student is seeking financial aid.
Financial Aid Status	Enter the student's status as it relates to receiving financial aid.
Marital Status	Select the marital status to be used for financial aid purposes. This marital status can differ from the Bio/Demo Data page marital status.
Email Address	Enter the student's email address.
Veteran	Select <i>Yes, No</i> or <i>No Response</i> to indicate whether the student is a veteran.
Orphan/Ward	Select <i>Yes, No, or No Response</i> to indicate whether the student is an orphan or ward of the state.
Dependents	Select <i>Yes, No, or No Response</i> to indicate whether the student has dependents.

Student's Income and Benefits

Tax Filed Status	Select from blank, <i>Completed, Non Filer, or Will File.</i>
Tax Form Type	Optional. Select from <i>1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US, or Other Non—US.</i>
Exemptions	Select the number of exemptions the student claimed on their tax U.S. Federal tax form.
Combat Pay	Displays an amount or is blank.
Dislocated Worker	Select <i>Yes, No, or N/R</i> (not reported).
Means Tested Benefits	Select <i>Yes, No, or N/R</i> (not reported).
Orphan/Foster/Ward after 13	Select <i>Yes, No, or N/R</i> (not reported).
Homeless	Select <i>Yes, No, or N/R</i> (not reported).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the student's tax form in the appropriate fields.

Student's Assets

Cash, Savings, and Checking	Enter a value.
IRA/ Keogh	Enter a value.
Self Employed	Select <i>Yes</i> or <i>No</i> .
Student Lives on Farm	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).
FTE Employees Greater Than 100	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (Not Reported).
Investment	Enter the value and debt amounts.
Home	Enter the value and debt amounts.
Home Purchase Year	Enter year home was purchased.
Price	Enter the price of the home indicated in the Home Purchase Year field.
Other Real Estate	Enter the value and debt amounts.
Business/Farm	Enter the value and debt amounts.

Student's Trust Information

Value of Trust Fund	Enter the value of the trust in USD.
Trust Established by	Select <i>Other</i> or <i>Parents</i> .
Trust Available	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response) to indicate the availability of the trust.

Student's Expenses

Enter values from the student's tax form.

Student's Expected Resources

Veterans Benefits	Enter the amount of veterans benefits received. The system displays <i>00</i> through <i>12</i> or blank.
Months	Enter the number of months the veterans benefits were received in the year.

VA Benefits Received Code	Enter the VA Benefits received by the student. Valid values are: <ul style="list-style-type: none"> • 1 = GI Bill - Active Duty (Ch 30) • 2 = Post-9/11 GI Bill (Ch 33) • 3 = GI Bill - Selective reserve (Ch 30) • 4 = REAP (Ch 1607) • 5 = Voc Rehab and Employment (Ch 31) • 6 = DEAP (Ch 35) • 7 = Any other type of VA educational benefits
Student's Earnings	Enter for both summer and school year.
Spouse's Earnings	Enter for both summer and school year.
Other Taxable Income	Enter for both summer and school year.
Untaxed Income	Enter for both summer and school year.
Grant/Scholarship	Enter a value.
Tuition Benefits	Enter a value.
Parent(s) Contribution	Enter a value.
Relatives Contributions	Enter a value.
Receive Tuition Benefits	Indicate whether or not the student receives tuition benefits from the parents' employers.
Agencies/Foundation Support	Indicate whether the student expects to receive from agencies or foundations to pay for educational expenses during any year of attendance.
Government Support	Indicate whether the student expects to receive from her government to pay for educational expenses during any year of attendance.

Reviewing Parent Information

Access the Parent Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data).

Student Data	Parent Data	Miscellaneous Data	Computation Data
OSWEGO,JONAH		ID: 1007	Institution: PSUNV
Dependency Status: Dependent		Source: Profile	Aid Year: 2011
			Need Summary
			FM IM INAS
Parents' Household			
Legal Residence:	VA <input type="button" value="v"/> Virginia	Housing Status:	Own Home <input type="button" value="v"/>
Residence Code:	US	Marital Status:	Married <input type="button" value="v"/>
Number Family Members:	4	Date of Remarriage:	
Number in College:	2	Means Tested Benefits:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/R
Parents' Expenses			
	Current	Expected	
Child Support Paid:	0	0	Other Tuition Paid:
Educational Loans:	32,500	35,000	20,500
Medical/Dental:	6,850	7,000	2
			2
Parent's Expected Expenses			
Utilities Expenses:	12,500	Property Insurance:	12,500
Food Expenses:	20,000	Vacation Cost:	0
Clothing Expenses:	5,000	Entertainment Cost:	0
Household Expenses:	7,500	Number Employed in Home:	0
Amount Owed to Others:	0	Amount Paid to Home Employee:	0
Annual Debt Payment:	0	Other Expenses:	4,800
Automobile Maintenance:	3,200	Monthly Mortgage/Rent Payment:	2,750
Parents' Assets			
Cash, Savings, and Checking:	42,500	Father Retirement Assets:	70000
Assets Held by Siblings:	0	Mother Retirement Assets:	45000
Owed to Parent by Others:	0	Annual Debt Income:	0
Value of Other Assets:	0		

Parent Data page (1 of 4)

Parents' Assets

Cash, Savings, and Checking:

42,500

Assets Held by Siblings:

0

Owed to Parent by Others:

0

Value of Other Assets:

0

Father Retirement Assets:

70000

Mother Retirement Assets:

45000

Annual Debt Income:

0

Value

Debt

Investment:

0

0

Home:

506,500

375,000

Home Purchase Year:

2000

Price:

400,000

Self Employed:

Yes

No

N/R

Family Lives on Farm:

Yes

No

N/R

FTE Employess Greater Than 100:

Yes

No

N/R

Value

Debt

Business:

0

0

Farm:

0

0

Other Real Estate:

0

0

Real Estate Purchase Year:Price:

0

Number of Businesses:

0

Number of Farms:

0

Prior Year Income

AGI:

75,000

Taxes Paid:

14,500

Itemized Deductions:

5,400

Untaxed Income:

0

Parent Data page (2 of 4)

Parent's Income and Benefits			
Tax Filed Status:	Completed	IRA/Keogh Payments:	0
Tax Form Type:	1040	IRA Distributions:	0
Number of Exemptions:	4	Tax Deferred Plans:	0
Adjusted Gross Income:	45,000	Untaxed Pensions:	0
Wages, Salary, and Tips:	45,000	Tuition and Fee Deduction:	0
Interest Income:	0	Medical/Spending Accounts:	0
Dividend Income:	0	Earned Income Credit:	0
Business/Farm:	0	Educational Credits:	0
Other Taxable Income:	0	Living Allowance:	0
Adjustments to Income:	0	Military/Clergy Allowances:	0
US Tax Paid:	3,820	Tax-Exempt Interest:	0
Hope Lifetime Learning Credit:	0	Foreign Income Exclusions:	0
Itemized Deductions:	0	Other Untaxed Income:	0
Father's Earnings:	0	IM Other Untaxed Income:	0
Mother's Earnings:	45,000	Family Support Income:	0
Social Security Benefit Family:	0	Receive TANF:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/R
Welfare TANF:	0	Receive SSI:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/R
Child Support Received:	0		
Parents' Expected Income			
Father's Earnings:	0	Other Taxable Income:	0
Mother's Earnings:	4,500	Untaxed Income and Benefits:	0

Parent Data page (3 of 4)

Parents' Information			
Parent Type 1:	Father	Parent Type 2:	Mother
DOB Parent 1:	11/17/1950	DOB Parent 2:	11/17/1950
Occupation Parent 1:	Engineer	Occupation Parent 2:	Teacher
Employer Parent 1:	Unemployed	Employer Parent 2:	Lorenza Elementary S
Attended College Code 1:	Full Time	Attended College Code 2:	
College Type Code 1:	4Y Public	College Type Code 2:	
Custodial Parent:		Combat Pay:	
Dislocated Worker:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/R		
Email Address:	ALPHA@ALPHAALPHA.COM		
Non-Custodial Parent Info			
Separation Year:		Divorce Year:	
		Non-Custodial Parent Contribution:	0

Parent Data page (4 of 4)

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Parent's Household

Legal Residence	Select the legal residence of the parent. Values include US states, Canada (CN), or Mexico (MX).
Residence Code	Enter the code for the parents' country of residence
Number Family Members	Number of family members in the parent's household. The system displays <i>01</i> through <i>99</i> and blank for dependent students.
Number in College	Number of dependents in college that are part of the parent's household. This number does not include parents who may be in college. The system displays <i>1</i> through <i>9</i> and blank for dependent students.
Housing Status	Select <i>Living with Others</i> , <i>Own Home</i> , <i>Provided by Employer</i> , or <i>Rent</i> .
Marital Status	Select: <i>Divorced</i> , <i>Married</i> , <i>Never Married</i> , <i>Remarried</i> , <i>Separated</i> , <i>Widowed</i> or <i>blank</i> .
Date of Remarriage	Displays the date for which the parent remarried.
Means Tested Benefits	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (Not Reported).

Parents' Expenses

Enter both the Current and Expected parents' expenses for these fields.

Parent's Expected Expenses

Utilities Expenses	Enter the amount the parents report as the annual utility expenses of the family.
Food Expenses	Enter the amount the parents report as the annual food expenses of the family.
Clothing Expenses	Enter the amount the parents report as the annual clothing expenses of the family.
Household Expenses	Enter the amount the parents report as the annual household expenses of the family.
Amount Owed to Others	Enter the amount the parents report as owed to others.
Annual Debt Payment	Enter the amount the parents report as their annual payments against their total debt.
Automobile Maintenance	Enter the amount the parents report as their annual automobile expenses.

Property Insurance	Enter the amount the parents report as the cost of their property insurance.
Vacation Cost	Enter the amount the parents report as spending on vacation costs.
Entertainment Cost	Enter the amount the parents report as spending on entertainment costs.
Number Employed in Home	Enter number of people the parents report as employed in the home.
Amount Paid to Home Employee	Enter the amount the parents report is paid to the employees who work in the home.
Other Expenses	Enter the cost of any parental expenses not reported anywhere else on the PROFILE.
Monthly Mortgage/Rent Payment	Enter the parents' monthly mortgage or rent payment.

Parent's Assets

Cash, Savings, and Checking	Enter a value.
Assets Held by Siblings	Enter a value.
Owed to Parent by Others	Enter the amount owed to parents by others
Value of Other Assets	Enter the value of any assets not already reported.
Father Retirement Assets	Can be blank or a number from 0000000 to 9999999.
Mother Retirement Assets	Can be blank or a number from 0000000 to 9999999.
Investment	Enter both the Value and Debt for this item and all the following items.
Home	Enter a value.
Home Purchase Year	Purchase year of the parent's home.
Price	Purchase price of the parents' home.
Self Employed:	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).
Family Lives on Farm	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).
FTE Employees Greater Than 100:	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).
Business	Enter value and debt amounts for the business.

Farm	Enter value and debt amounts for the farm.
Other Real Estate	Enter value and debt amounts for other real estate.
Real Estate Purchase Year	Enter purchase year of any other real estate.
Price	Enter purchase price of any other real estate.
Number of Businesses	Enter a number 0 to 9 or leave blank.
Number of Farms	Enter a number 0 to 9 or leave blank.

Prior Year Income

AGI	Adjusted gross income from the prior year's tax form.
Taxes Paid	Enter a value.
Itemized Deductions	Total of the prior year's itemized deductions.
Untaxed Income	Enter a value.

Parent's Income and Benefits

Many fields in this group box refer to items on the U.S. federal tax form or data collected from applicable sources, such as your institution's financial aid application or other third-party sources.

Tax Filed Status	Select from blank, <i>Completed</i> , <i>Non Filer</i> , or <i>Will File</i> .
Tax Form Type	Optional. Select from <i>1040</i> , <i>1040A</i> , <i>1040EZ</i> , <i>Canadian</i> , <i>Puerto Rican</i> , <i>Other US</i> , or <i>Other Non—US</i> .
Number of Exemptions	Select the number of exemptions the parents claimed on their tax U.S. federal tax form.
Social Security Benefit Family	Enter untaxed social security benefits.
Other Untaxed Income	Enter other untaxed income.
Receive TANF	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).
Receive SSI	Select <i>Yes</i> , <i>No</i> , or <i>N/R</i> (no response).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the Parent's tax form in the appropriate fields.

Parents' Expected Income

Enter values from the parents' tax form.

Parents' Information

Parent Type 1 and Parent Type 2 Select the type of parent providing information on the PROFILE and assigned to the traditional father (1) or mother (2) position.

- 1 = Father
- 2 = Mother
- 3 = Stepfather
- 4 = Stepmother
- 5 = Legal guardian
- 8 = Other

DOB Parent 1 and DOB Parent 2 Indicates the reported parents' dates of birth. The information is reported as MM/DD/YYYY or the field may be blank.

Occupation Parent 1 and Occupation Parent 2 Indicates the occupation and can be blank.

Employer Parent 1 and Employer Parent 2 Indicates the employer and can be blank.

Attended College Code 1 and Attended College Code 2 Indicates if the parent attended college and if on a full-time or part-time basis.

College Type Code 1 and College Type Code 2 Indicates the type of college the parent attended.

Custodial Parent Identifies a dependent student's custodial parent when the biological/adoptive parents are separated, divorced, or were never married. Values include: *Father* and *Mother*.

Dislocated Worker Select *Yes*, *No*, or *N/R* (not reported).

Email Address Displays the parents' preferred email address. This field can be blank or contain up to 35 characters.

Combat Pay Displays an amount or is blank.

Non-Custodial Parent Info

Separation Year Enter the year of the separation.

Divorce Year Enter the year of the divorce.

Non-Custodial Parent's Contribution Enter the financial contribution to the student by the non-custodial parent.

See Also

Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Using Equation Engine in Packaging, page 225

Reviewing Currency Information, Family Information, and Institutional Questions

Access the Miscellaneous Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data).

Student Data	Parent Data	Miscellaneous Data	Computation Data
OSWEGO,JONAH		ID: 1007	Institution: PSUNV
Dependency Status: Dependent		Source: Profile	Aid Year: 2011
		Need Summary FM IM INAS	
Currency Information			
Currency Code:	<input type="text"/>	Converted Currency Code:	<input type="text"/>
Currency Rate:	<input type="text"/>	Converted Currency Rate:	<input type="text"/>
Country Coefficient:	<input type="text"/>		
Explanation / Certification			
<input checked="" type="checkbox"/> Special Circumstances			
Family Members Customize Find First 1 of 1 Last			
Relationship	Age	Attend College	College Type
Child/Step	12	Full Time	4Y Public
		+ -	
School Selection Customize Find First 1 of 1 Last			
*CSS Code	Housing Code		
3078	Campus Housing	+ -	
FNAR Messages Customize Find First 1-6 of 6 Last			
Message Number	Message Text	Value 1	Value 2
55	Parent's AGI at least \$3000 less than wages.		
56	Parent's AGI and derived AGI (\$xxxxxxx) differ by \$1000 or more.	145250	
60	Parent's 2008 income is less than 2009 by more than \$2000.		
71	Parent's reported interest/dividends of less than 5% on investments and savings of greater than \$5000.		
74	Parent's home using Housing Multiplier; value = \$xxxxxxx; equity = \$xxxxxxx.	392080	261080
75	Parent's home increased less than 3% per year. 3%: value = \$xxxxxxx; equity = \$xxxxxxx.	411959	280959
Institutional Questions Customize Find First 1 of 1 Last			
*Number	Answer		
861	2	+ -	

Miscellaneous Data page

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Currency Information

Currency Code Enter the currency in which the original data was reported by the student.

Currency Rate Enter the currency conversion rate used to process the student's data.

Country Coefficient Enter the country coefficient used to process the student's data.

Converted Currency Code Enter the original currency converted into US dollars reported by citizens living abroad and Canadians.

Converted Currency Rate	Enter the rate the student used in converting their currency into US dollars. Reported by citizens living abroad and Canadians.
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Explanation / Certification

Special Circumstances	Select this check box to indicate that the student/family has notified the institution of Special Circumstances that may affect the calculation of financial need. The College Board PROFILE also uses the information listed in Section Q to set this indicator flag to inform the institution that modified institutional questions exist for the student.
------------------------------	--

Family Members

Relationship	Select the relationship to the student.
Age	Enter the family member's age.
Attend College	Select <i>blank, Yes, Full-Time, Yes, Half-Time, or No, Will Not Attend.</i>
College Type	Select a college type.

School Selection

CSS Code	This is the institution's code number as reported by the student on the PROFILE application. Each school the student selected to receive their application is listed.
Housing Code	This is the type of housing the student expects to have.

FNAR Messages

The system displays the Financial Need Analysis Report message number, message text, and message Values 1 through 5, if any. These College Board PROFILE messages inform you about processing exceptions to data received and assumptions that should be taken into consideration when reviewing the institutional application.

Institutional Questions

Number	Number of an application question that the student/family believes warrants further explanation. This number may also refer to a series of additional questions that have been modified for the institution by College Board PROFILE.
Answer	Answer to the question shown in the Number field.

Reviewing All Computed Data for Student and Parents

Access the Computation Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Data).

Student Data	Parent Data	Miscellaneous Data	Computation Data
OSWEGO,JONAH		ID: 1007	Institution: PSUNV
Dependency Status: Dependent		Source: Profile	Aid Year: 2011
			Need Summary
			FM IM INAS
Contribution Summary			
	PARENT CONTRIBUTION		
	IM	IM w / Options	EFM
Total Income:	149,750	149,750	149,250
Total Contribution:	0	0	0
Number in College Adjustment:	0.0 %	0.0 %	0.0 %
Contribution for Student:	31,068	35,672	34,458
From Income:	23,986	23,986	N/A
From Assets:	7,082	11,686	N/A
Calculated Contribution:	0	0	0
Custodial Parent Information			
	PARENT CONTRIBUTION		
	IM	IM w / Options	
Total Income	0	0	
Percent Income	%	%	
From Income	0	0	
From Assets	0	0	
Education Savings Calculation			
	AESA	CESA	
Parent:	1	15	Student:

Computation Data page (1 of 3)

Income							
	PARENT CONTRIBUTION			STUDENT CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Taxable Income:	0	0	0	0	0	0	0
Untaxed Income:	0	0	0	0	0	0	0
Adjustments to Income:	0	0	0	0	0	0	0
Total Income:	149,750	149,750	149,250	1,900	2,000	1,900	1,900
Allowances							
	PARENT CONTRIBUTION			STUDENT CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
U.S. Income Tax:	0	0	0	0	0	0	0
State Income Tax:	0	0	0	0	0	0	0
FICA Taxes:	0	0	0	0	0	0	0
Medical/Dental:	0	0	0	0	0	0	0
Elementary/Secondary Tuition:	0	0	0	0	0	0	0
Employment Allowance:	0	0	0	0	0	0	0
Annual Education Savings:	0	0	N/A	0	0	0	N/A
Income Protection Allowance/MMA:	0	0	0	0	0	0	0
Total Allowances:	0	0	0	0	0	0	0
Calculated Available Income:	0	0	0	0	0	0	0
Available Income:	0	0	0	0	0	0	0
Total Contribution - Income:	23,986	23,986	N/A	1,550	1,550	1,550	0

Computation Data page (2 of 3)

Assets							
	PARENT CONTRIBUTION			STUDENT CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Cash, Savings, and Checking:	0	0	0	0	0	0	0
IRA Value:	N/A	N/A	0	0	0	0	0
Home Equity:	0	0	0	0	0	0	0
Real Estate/Investment Equity:	0	0	0	0	0	0	0
Adjusted Business/Farm Value:	0	0	0	0	0	0	0
Sibling's Assets/Prepaid Tuition:	0	0	N/A	N/A	N/A	N/A	N/A
Value of Trusts:	0	0	N/A	0	0	0	0
Net Worth:	0	0	0	0	0	0	0
Emergency Reserve Allowance:	0	0	N/A	0	0	0	N/A
Cumulative Education Savings:	0	0	N/A	0	0	0	N/A
Low Income Asset Allowance:	0	0	N/A	0	0	0	N/A
Discretionary Net Worth:	0	0	0	0	0	0	0
Asset Protection Allowance:	N/A	N/A	0	N/A	N/A	N/A	0
Conversion Percentage:	N/A	N/A	0.0 %	N/A	N/A	N/A	0.0 %
Income Supplement:	N/A	N/A	0	N/A	N/A	N/A	0
Total Contribution - Assets:	7,082	11,686	N/A	38	38	8	0

Computation Data page (3 of 3)

Note. Computation tables display no intermediate values until the INAS calculation is called using batch or online calculation.

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

This page is designed to display computed need analysis results based on both the parent's and student's information. Therefore, the page displays a Parent's Contribution Section and a Student's Contribution Section. The following sections describe what each column represents. For further information about the fields and sections in this component, please refer to the *College Board PROFILE User's Guide*, which is only available to College Board PROFILE subscribers.

Note. To more closely align interim calculation results with the Estimated Federal Methodology (EFM) computation worksheets from the College Board, the Computation Data page displays an N/A value for several fields. For parents of dependent students and independent students with dependents, EFM calculations display N/A for From Income, From Assets, Total Contribution - Income and Total Contribution - Assets fields.

Contribution Summary

The PARENT'S CONTRIBUTION section displays three columns: IM, IM w/Options, and EFM.

- The IM column displays standard base INAS calculations. Oracle supports the College Board defaulted options at the time of initial load.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology.
- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

The STUDENT'S CONTRIBUTION section displays four columns: IM, IM w/ Options, IM Estimated, and EFM.

- The IM column displays standard base INAS calculations. PeopleSoft supports the College Board defaulted options at the time of initial load.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology.
- The IM Estimated column displays an estimated calculation for the student's contribution. The IM Estimated result is based on using the estimated summer and academic year data. The FNAR computations for this section are based on nine-month calculation regardless of the student's dependency status.
- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

Custodial Parent Information

The system displays the calculations for Total Income, Total Contribution, Number in College Adjustment, Contribution for Student, contribution From Income, and contribution From Assets for Parent's Contribution and Student's Contribution.

For the PARENT's CONTRIBUTION IM:

Total Income	Indicates the custodial parent's total contribution for the student from the base IM computation.
Percent Income	Indicates the custodial parent's percentage of total parents income from the base IM computation.
From Income	Indicates the custodial parent's contribution from income for the student from the base IM computation.
From Assets	Indicates the custodial parent's contribution from assets for the student from the base IM computation.

For the PARENT'S CONTRIBUTION IM w/Options

Total Income	Indicates the custodial parent's total contribution for the student from the options IM computation.
Percent Income	Indicates the custodial parent's percentage of total parental income from the option IM computation.

From Income	Indicates the custodial parent's contribution from income for the student from the option IM computation.
From Assets	Indicates the custodial parent's contribution from assets for the student from the options IM computation.

Education Savings Calculations

The system displays the Parent's and the Student's Annual Education Savings Allowance (AESAs) and Cumulative Education Savings Allowance (CESA) calculations. These are PROFILE specific calculated values used in INAS calculations for Institutional Methodology.

Income

The system displays the calculations for Taxable Income, Untaxed Income, Adjustments to Income, and Total Income for Parent's Contribution and Student's Contribution.

Allowances

The system displays the calculations for U.S. Income Tax, FICA Taxes, Medical/Dental, Elementary/Secondary Tuition, Employment Allowance, Annual Education Savings, Income Protection Allowance/MMA, Total Allowances, Calculated Available Income, and Available Income for Parent's Contribution and Student's Contribution. The Total Contribution - Income amount is the sum of all the fields in the Allowances section.

Assets

The system displays the calculations for Cash Savings, IRA Value, Home Equity, Real Estate/Investment Equity, Adjusted Business/Farm Value, Sibling's Assets/Prepaid Tuition, Value of Trusts, and Net Worth for Parent's Contribution and Student's Contribution.

The system displays the calculations for Emergency Reserve Allowance, Cumulative Education Savings, Low Income Asset Allowance, Discretionary Net Worth, Asset Protection Allowance, Conversion Percentage, and Income Supplement for Parent's Contribution and Student's Contribution. The Total Contribution - Assets amount is the sum of all the fields in the Assets section.

See Also

Instructions provided with the College Board PROFILE or Need Access applications.

Loading and Managing PROFILE Processes for the 2009–2010 Aid Year

Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load PROFILE applications.
- Recycle PROFILE suspense records.
- Process PROFILE suspense move.

Note. Oracle supports the CSS / Financial Aid PROFILE Data Reporting Layout (with corresponding school year) for PROFILE data received from the College Board.

Pages Used to Load and Manage PROFILE Processes

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Profile Load nn/nn	RUNCTL_FAPFIN01	Financial Aid, File Management, PROFILE Import, Load Records 20nn-20nn, Profile Load nn/nn	Import PROFILE applications into the database.
PROFILE Suspense Recycle nn/nn	RUNCTL_FAPFSR01	Financial Aid, File Management, PROFILE Import, Recycle Suspense 20nn-20nn, Profile Suspense Recycle nn/nn	View PROFILE suspense records.
Profile Suspense Move nn/nn	RUNCTL_FAMVPF01	Financial Aid, File Management, PROFILE Import, Move Suspense 20nn-20nn, Profile Suspense Move nn/nn	Process suspended PROFILE records that have been marked as add or delete on the Profile Data Load Parameters page.

Loading PROFILE Applications

Your Search/Match, Add Level, and Suspense Level Rules determine whether the student's PROFILE is inserted into either the Institutional Application (IM_*) tables or the PROFILE Suspense Management tables. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE or Need Access application. Instead of loading every student who has listed your school code on the PROFILE or Need Access application, you can load only those students officially admitted.

Access the Profile Load nn/nn page (Financial Aid, File Management, PROFILE Import, Load Records 20nn-20nn, Profile Load nn/nn).

Profile Load 07/08	
Run Control ID:	PS
Report Manager Process Monitor Run	
*Academic Institution:	<div>PeopleSoft University</div> <div>▼</div>
Process Name:	FAPFIN08
Input/Output file:	\\BURSQA01\rat02\INAS and Pell flatfiles_2008\IM_2008.dat
Update:	Yes
Last Run Date:	02/26/2007
Last Sequence Nbr:	1

Profile Load nn/nn page

The system displays the Run Control ID. The system displays the Process Name, Input/Output file, and Update values that you set in the Financial Aid Run Controls page. The system also displays the Last Run Date and the Last Sequence Number of the process.

When you run any of the processes, an SQR Log is created that lists each student and what action was taken regarding their record.

This process job runs two processes, the PROFILE Load process and the Automated Batch Publish process. If the PROFILE Load process fails, the Automated Batch Publish process stays in *pending* status and the job errors.

Overriding Contributions with PROFILE Load Processing

Use the Override Institutional EFC link and page to make a professional judgement adjustment to the academic or nonstandard Parent Contribution, and Student Contribution. If the Use EFC Override Value check box is selected on the INAS Institutional Extension pages when the PROFILE Load and Suspend/Move processes run, the PROFILE load evaluates and incorporates the EFC override values. The evaluation process occurs only if the Use EFC Override Values option is selected on the Profile Data Load Parameters page (Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters). After the PROFILE Load and Suspend/Move process evaluates and loads the student record, the EFC override values display on the Contribution for Student row on the Computation Data page. The system marks the values with an *O* on the Computation Data page.

Recycling PROFILE Suspend Records

Access the Profile Suspend Recycle nn/nn page (Financial Aid, File Management, PROFILE Import, Recycle Suspend 20nn-20nn, Profile Suspend Recycle nn/nn).

Profile Suspense Recycle 07/08	
Run Control ID: PS	Report Manager Process Monitor Run
<hr/>	
*Academic Institution:	<div>PeopleSoft University ▼</div> <div>Update: No</div>
Process Name:	
Add Action:	Add to Database (Replace)
<hr/>	
Last Run Date:	Last Sequence Nbr: 0

Profile Suspense Recycle nn/nn page

The PROFILE Suspense Recycle process reviews PROFILE suspense records and attempts to load any application currently meeting PROFILE data load parameters of Add Level, Suspense Level or Search/Match Level. The process uses current parameters, not the parameters used for the initial load. A system review enables a selection process of initially suspended PROFILE records that now meet the conditions of the data load parameters.

For example, a student's record did not meet the condition of being admitted during the initial load process. Two days later the student is admitted and now meets the condition of being admitted. To process these records in batch, you can run the PROFILE Suspense Recycle process as a scheduled routine, which automatically sets the Processing Action Status on the Profile Suspense Management page. to the Add Action value defined in the Suspense Recycle Run Control.

Processing PROFILE Suspense Move

Access the Profile Suspense Move nn/nn page (Financial Aid, File Management, PROFILE Import, Move Suspense 20nn-20nn, Profile Suspense Move nn/nn).

Profile Suspense Move 07/08

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Academic Institution: PSUNV PeopleSoft University

Update: No

Process Name:

Last Run Date:

Last Sequence Nbr: 0

Profile Suspense Move nn/nn page

The PROFILE Suspense Move process ignores the PROFILE data load parameters and loads the marked records. You first set the Processing Action Status on the Profile Suspense Management page through the suspense recycle process, or manually set the Processing Action Status. The Processing Action Status values include *Add - Replace*, *Add*, *Do NOT Replace*, or *Delete* for individually suspended records. The flagged records are selected and the appropriate action, load or delete, is applied to the Application Tables by the Suspense Move background process.

This process job runs two processes, the PROFILE Suspense Move process and the Automated Batch Publish process. If the PROFILE Suspense Move process fails, the Automated Batch Publish process remains in *pending* status and the job errors.

Loading and Managing PROFILE Processes for the 2010–2011 Aid Year

Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load PROFILE records.
- View PROFILE load summaries.
- Manage suspended PROFILE records.

Note. Oracle supports the CSS / Financial Aid PROFILE Data Reporting Layout (with corresponding school year) for PROFILE data received from the College Board.

Pages Used to Load and Manage PROFILE Records

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load Records 20nn-20nn	SFA_PF_RUNCNTL	Financial Aid, File Management, PROFILE Import, Load Records 20nn-20nn, Load Records 20nn-20nn	Import PROFILE records into the database.
Load Summary 20nn-20nn	SFA_PF_IN_LOAD	Financial Aid, File Management, PROFILE Import, Load Summary 20nn-20nn, Load Summary 20nn-20nn	From the PROFILE Staging Table, view the load status and other details of each record of a PROFILE load instance.
Suspense Management 20nn-20nn	SFA_PF_SUSP_CNTRL	Financial Aid, File Management, PROFILE Import, Suspense Management 20nn-20nn, Suspense Management 20nn-20nn	Process suspended or skipped PROFILE records.

Loading PROFILE Applications

Every time the PROFILE Load process is run, all records are inserted into the PROFILE Staging tables. Depending on your Search/Match, Add Level, and Suspense Level Rules, the student's record is inserted into either the Institutional Application (IM_*) tables or managed through the PROFILE Suspense Management component. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE application. Instead of loading every student who has listed your school code on the PROFILE application, you can load only those students officially admitted.

Access the Profile Load 20nn—20nn page (Financial Aid, File Management, PROFILE Import, Load Records 20nn—20nn, Load Records 20nn—20nn).

Load Records 2010-2011

Run Control ID: PROF_TEST [Report Manager](#) [Process Monitor](#) Run

*Load Option: Load Only

*Academic Institution: PeopleSoft University

*Aid Year: 2011

*Add Action: Add New Record Only

File Parameters

Run Option: ☒ Single File ☐ File List

File Path: \\rtdc78774vmc\Temp\ADRESS_TEST\LOAD_ADDRESS_ADD_FA896

PROFILE Load Records 20nn-20nn

Load Option

Select the Load Option.

- **Load Only** — Select this option to only load the specified PROFILE files. No suspended or skipped records are re-evaluated for loading.
- **Recycle Only** — Select this option to only re-evaluate suspended PROFILE records for loading.
- **Load and Recycle** — Select this option to both load the specified PROFILE files and re-evaluate suspended PROFILE records.
- **Load Unprocessed** — Select this option to load all Unprocessed PROFILE records in the PROFILE Staging table. This skips records with a status of "Error Encountered."

Add Action

Select the action to be taken for rows that can be loaded.

- **Add New Record Only** — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records.
- **Overwrite Existing Record** — Add new PROFILE records into the system AND update existing PROFILE records.

Note. Each PROFILE XML file must have a unique file name. If you attempt to load a record with a duplicate file name, the PROFILE load process fails.

See Also

[Chapter 21, "Defining Application Processing Options," Page Used to Set Up PROFILE Data Load Parameters, page 589](#)

[Chapter 21, "Defining Application Processing Options," Setting Up PROFILE Data Load Parameters, page 589](#)

[Chapter 24, "Processing INAS," Overriding Expected Family Contribution \(EFC\), page 749](#)

Viewing PROFILE Load Summaries

The PROFILE Load Summary component displays the load status and other details of each record of the file selected to review from the PROFILE Staging Table.

Access the PROFILE Load Summary 20nn-20nn (Financial Aid, File Management, PROFILE Import, Load Summary 20nn-20nn, Load Summary 20nn-20nn).

PROFILE Batch Detail Records tab

Load Summary 2010-2011

Load Instance:

5

Created Date:

2009-10-23

PROFILE Load Batch Detail

PROFILE Batch Detail Records

Student Information

Load Information

PROFILE Staging Table Data

Customize

Find

First

1-164 of 164

Last

CSS ID	Load Status	EmplID	Student's Admit Level	Award Year	Application Type	Student Record Type	Update Status to Error
%%%%%%%%	Error Encountered			2011	Domestic PROFILE	Original Data	
3000011	Unprocessed			2011	Registration Only Record		Update Status to Error
3000013	Unprocessed			2011	Registration Only Record		Update Status to Error
3000041	Unprocessed			2011	Domestic PROFILE	Original Data	Update Status to Error
3000045	Unprocessed			2011	Registration Only Record		Update Status to Error
3000046	Unprocessed			2011	Registration Only Record		Update Status to Error
3000047	Unprocessed			2011	Registration Only Record		Update Status to Error

PROFILE Load Summary 20nn-20nn page, Batch Detail Records tab

CSS ID Displays the unique identifier assigned to student by the PROFILE system.

Load Status

Displays the Load Status of the record.

- *Unprocessed* — Record is loaded to PROFILE Staging table but is not loaded to Inst App tables.
- *Suspended* — Record failed Search/Match or PROFILE Add Level load rules.
- *Processed* — Record is loaded to application table.
- *Discarded* — Record is not loaded because it is a Noncustodial PROFILE or Registration Only record.
- *Skipped* — Record meets Search/Match and PROFILE Add Level load rules, but there is an existing record and the load parameter is "Add New Record Only" or the Review Status is Complete on the Packaging Status Summary.
- *Error Encountered* — Scenarios in which status is set include: Data Load Parameters not set, missing or mismatched Aid Year, SSN invalid, SQL Error, and invalid data in Search/Match fields. Status can be set by user manually when an errant record is identified on the PROFILE XML file.

Student's Admit Level

Displays the student's admit level as associated with Academic Program Statuses in the Defining Application Processing Options, Working with Applications, Reviewing Admit Level Associations page.

The values are:

- *5 - Accepted/Continuing*
- *4 - Admitted*
- *3 - Applied/Pending*
- *2 - Inactive*
- *1 - Has Not Applied*

Application Type

Displays the PROFILE Application Type

- *Domestic PROFILE*
- *Noncustodial PROFILE*
- *Registration Only record*
- *International PROFILE*

Student Record Type Displays the CSS Student Record Type

- *Original Data*
- *ACR (Additional College Request)*
- *Duplicate Record*

Update Status to Error Click this button to set the Load Status from *Unprocessed* to *Error Encountered*. Records with a Load Status of *Error Encountered* can be skipped during subsequent PROFILE Load attempts.

Student Information tab

Load Summary 2010-2011

Load Instance:34

Created Date:2009-08-24

PROFILE Load Batch Detail

CustomizeFind1-7 of 7Last

PROFILE Batch Detail RecordsStudent InformationLoad InformationPROFILE Staging Table Data

National ID	Last Name	First Name	Middle Name	Birthdate	Dependency Status	Financial Aid Status
454-31-9875	DEMELLOW	VIRGIN		1989-01-04	Dependent	First-time
454-31-9877	SCHUMACAR	KUMAR	K	1989-01-06	Dependent	First-time
454-31-9876	PEREZ	ASHLEY	R	1989-01-05	Dependent	First-time
454-31-9873	BRAND	DIANA	S	1989-01-02	Dependent	First-time
454-31-9874	COCKRELL	ANDREW	S	1989-01-03	Dependent	First-time
454-31-9878	ANISTON	KATE	K	1989-01-07	Dependent	First-time
454-31-9872	FROST	MICKY		1981-07-05	Dependent	First-time

PROFILE Load Summary 20nn-20nn page, Student Information tab

National ID For United States students, displays the Social Security Number. For non-United States students, displays the student's country and National Identifier or default National Identifier.

Dependency Status Displays *Dependent* or *Independent*

Financial Aid Status

- *First-time* – Either a first-time applicant entering student or a first-time applicant, continuing student
- *Renewal Applicant* — Continuing student

Load Information tab

Load Summary 2010-2011

Load Instance:

34

Created Date:

2009-08-24

PROFILE Load Batch Detail

Customize

Find

First

1-7 of 7

Last

PROFILE Batch Detail Records

Student Information

Load Information

PROFILE Staging Table Data

CSS ID	Load Status	Suspend Reason	Skip Reason
3003173	Processed		
3010500	Processed		
3012186	Processed		
3016332	Processed		
3021110	Skipped		Student Already Exists
3025777	Processed		
3507103	Processed		

PROFILE Load Summary 20nn-20nn page, Load Information tab

Suspend Reason

- *Student ID not Found* — No student met the specified Search/Match Rules criteria
- *Student not at Load Level* — Student ID found, but student is not at the designated Admit Level.
- *Non-Unique Student ID Found* — More than one student meets the Search/Match criteria.

Skip Reason

- *Final Review Flag Set* — Review Status is Complete
- *Student Already Exists* — PROFILE Load encountered a matching ID despite the Add Action = Add New Record Only; therefore, the student is suspended.
- *Student Not at Suspend Level* — Student fails Suspend Level rule.

PROFILE Staging Table Data tab

This tab displays links to view PROFILE data as it is received from the College Board.

Load Summary 2010-2011

Load Instance:

34

Created Date:

2009-08-24

PROFILE Load Batch Detail

Customize

Find

First

1-7 of 7

Last

PROFILE Batch Detail Records

Student Information

Load Information

PROFILE Staging Table Data

ESS

CSS ID	Student Data	Parent Data	Miscellaneous Data	Computation Data
3003173	Student Data	Parent Data	Miscellaneous Data	Computation Data
3010500	Student Data	Parent Data	Miscellaneous Data	Computation Data
3012186	Student Data	Parent Data	Miscellaneous Data	Computation Data
3016332	Student Data	Parent Data	Miscellaneous Data	Computation Data
3021110	Student Data	Parent Data	Miscellaneous Data	Computation Data
3025777	Student Data	Parent Data	Miscellaneous Data	Computation Data
3507103	Student Data	Parent Data	Miscellaneous Data	Computation Data

PROFILE Load Summary 20nn-20nn page, PROFILE Staging Table Data tab

Managing Suspended PROFILE Records.

Access the Profile Suspense Management Records page (Financial Aid, File Management, PROFILE Import, Suspense Management 20nn-20nn, PROFILE Suspense Management).

Profile Suspense Management Records						
Load Instance:		5				
Aid Year:		2011	Financial Aid Year 2010 - 2011			
CSS School Code:		9990				
		CSS ID:	3666053	SSN: 454-31-9956		
		Institution: PSUNV				
Date Application Loaded:		2009-09-21		'Load Status: Skipped		
Date Application Received:				<input type="radio"/> Add Profile <input type="radio"/> Recycle <input type="button" value="Process"/>		
Student Information			Add Action			
ID:	FAPF085	<input type="checkbox"/> ID Lock	'Add Action: Add New Record Only			
Birthdate:	1987-01-21					
Student's Admit Level:	4 - Admitted					
Skip Reason:	Student Already Exists					
Max Match Level Found:						
General Information FNAR Messages Search/Match			Application Type			
			<input checked="" type="radio"/> Domestic PROFILE			
			<input type="radio"/> Noncustodial PROFILE			
			<input type="radio"/> Registration Only Record			
			<input type="radio"/> International PROFILE			

PROFILE Suspense Management Records page

Use the PROFILE Suspense Management Records page to review and manage unmatched or unprocessed PROFILE records.

Load Status	<p>Displays the current status of the record. If the Load Status is <i>Skipped</i> or <i>Suspended</i>, the field can be updated. If the status is <i>Discarded</i>, the field is view only.</p> <hr/> <p>Note. If you update the Load Status to <i>Discarded</i>, the Load Status cannot be updated again.</p> <hr/>
Add PROFILE	Select this radio button and click the Process button to load a suspended PROFILE record into the application table.
Recycle	Select this radio button and click the Process button to have the PROFILE records reconsidered by the PROFILE load process using the Global Add Level and Suspend Level rules.
Process button	After selecting the Add PROFILE or Recycle radio button, click this button to invoke a real-time action to load the PROFILE record into the Institutional Application (IM_*) tables.
Add Action	<p>Select the action to be taken for rows that can be loaded.</p> <ul style="list-style-type: none"> • Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records. • Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.
ID	<p>Select the ID to use to load the PROFILE record into the application tables.</p> <p>If the field is left blank and the ID Lock is cleared, the process calls Search/Match to attempt to assign an ID.</p> <p>If the field is left blank, the ID Lock is checked, and Add PROFILE is selected, the process assigns a new ID based on the Last ID assigned.</p>
ID Lock	<p>Select this check box after the selecting the ID to force the PROFILE load process to use the ID as the matching person.</p> <p>If the ID field is blank, the ID Lock field is selected, the Load Action is either Add PROFILE, and the student does not exist in the system (new record), the system assigns a new ID based on the Last ID assigned.</p> <p>When Recycle is selected, if ID Lock is checked then the ID field is always expected to be populated.</p> <p>If the ID field is blank, the ID Lock field is NOT selected, the Load Action is Recycle, and the student does not exist in the system (new record), the system calls Search/Match to attempt to assign an ID.</p> <p>When Add PROFILE is selected ID Lock is always expected to be checked.</p>
Max Match Level Found	Displays the highest Search Match Level rule that was met for this PROFILE record.
General Information	Click this link to display general information about the student.

FNAR Messages

Click this link to display FNAR messages.

Search/Match

Click this link to access the Person Search Match page and search for a student ID to match to the PROFILE record.

Loading and Managing Need Access Processes

Before you begin loading applications, define all Need Access data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load Need Access applications.
- Recycle Need Access suspense records.
- Process Need Access suspense moves.

Note. Oracle supports loading Need Access records into your institution's database. Oracle supports the CSS/Financial Aid PROFILE Data Reporting Layout (with corresponding school year) for Need Access data received from the Access Group.

You can perform a valid institutional methodology (IM) INAS calculation if your global policy options (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Global and Federal Options) are defined for Need Access.

Pages Used to Load and Manage Need Access Processes

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn–20nn. Oracle supports two academic years of Need Access data loads.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Need Access Load nn/nn	RUNCTL_FAMVNA01	Financial Aid, File Management, Need Access Import, Load Records 20nn–20nn, Need Access Load nn/nn	Import Need Access applications into the database.
Need Access Suspense Recycle nn/nn	RUNCTL_FANASR01	Financial Aid, File Management, Need Access Import, Recycle Suspended 20nn–20nn, Need Access Suspense Recycle nn/nn	View Need Access suspense records.
Need Access Move Suspense nn–nn	RUNCTL_FAMVNA01	Financial Aid, File Management, Need Access Import, Need Access Move Suspense nn–nn	Process suspended Need Access records that have been marked as add or delete on the Need Access Data Load Parameters page.

Loading Need Access Applications

Access the Need Access Load nn/nn page (Financial Aid, File Management, Need Access Import, Load Records 20nn-20nn, Need Access Load nn/nn).

Need Access Load 07/08

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

*Academic Institution:
Update: No

Process Name:

Input/Output file:

Last Run Date:
Last Sequence Nbr: 0

Need Access Load nn/nn page

Data not loaded to the Need Access tables can be loaded to a staging table. As an example, your school may only admit 60 percent of those students who actually list your School Code on the Need Access or PROFILE Application. Instead of loading every student with your school code on their application, you can load only those students officially admitted.

This job process runs two processes, Need Access Load process and the Automated Batch Publish process. If the Need Access Load process fails, the Automated Batch Publish process remains in *pending* status and the job errors.

The system displays the Process Name, Input/Output file, and Update indicator values that you set in the Financial Aid Run Controls page and displays the last run date and the last sequence number of the process.

When you run the any of the processes, an SQR log lists each student and what action was taken regarding their record.

Recycling Need Access Suspense Records

Access the Need Access Suspense Recycle nn/nn page (Financial Aid, File Management, Need Access Import, Recycle Suspended 20nn-20nn, Need Access Suspense Recycle nn/nn).

Need Access Suspense Recycle 07/08	
Run Control ID: PS	Report Manager Process Monitor Run
*Academic Institution:	<div>PeopleSoft University ▼</div> <div>Update: No</div>
Process Name:	
Add Action:	Add to Database (Replace)
Last Run Date:	Last Sequence Nbr: 0

Need Access Suspense Recycle nn/nn page

The Need Access Suspense Recycle reviews Need Access suspense records and attempts to load any application currently meeting Need Access data load parameters of Add Level, Suspense Level, or Search/Match Level. The process uses current parameters, not parameters used for the initial load. A system review enables a selection process of initially suspended Need Access records that now meet the conditions of the data load parameters.

For example, a student's record did not meet the condition of being admitted during the initial load process. Two days later the student is admitted and now meets the condition of being admitted. To process these records in batch, you can run the Need Access Suspense Recycle process as a scheduled routine, which automatically sets the Processing Action Status on the Suspense Control page to the *Add Action* value defined in the Suspense Recycle Run Control.

Note. After the initial load has been run, you can reset the data load parameters, to move records from suspense to the application tables for students who did not meet your first load criteria.

The system displays the Process Name, Input/Output File, and Update indicator values that you set in the Financial Aid Run Controls page and displays the add action, last run date, and the last sequence number of the process.

Processing Need Access Suspense Moves

Access the Need Access Move Suspense nn/nn page (Financial Aid, File Management, Need Access Import, Need Access Move Suspense nn/nn).

Need Access Suspense Move 07/08	
Run Control ID: PS	Report Manager Process Monitor Run
Academic Institution: PSUNV PeopleSoft University	Update: No
Process Name:	
Last Run Date:	Last Sequence Nbr: 0

Need Access Suspense Move nn/nn page

The Need Access Suspense Move process ignores the Need Access data load parameters and loads the marked records. You either set the Processing Action Status on the Need Access Suspense Management page through the suspense Recycle process or manually set the Processing Action Status. The Processing Action Status values include *Add- Replace*, *Add*, *Do NOT Replace* and *Delete* for individually suspended records. The process selects the flagged records applies the appropriate action, load or delete, to the Application Tables.

Using PROFILE Suspense Management (for use with Aid Years prior to 2010–2011 only)

This section discusses how to use PROFILE suspense control.

Pages Used to Manage PROFILE Applications


Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads

Page Name	Definition Name	Navigation	Usage
Profile Suspense Management	PROF_SUSP_CNTRL_nn	Financial Aid, File Management, PROFILE Import, Suspended Records 20nn-20nn, Profile Suspense Management	Manage the PROFILE applications you choose not to load during an incoming application process.

Page Name	Definition Name	Navigation	Usage
General Information	PROF_SUSP_INFO_SEC	Click the General Information link on the Profile Suspense Management page.	View the general information for a student whose record is in suspense.
FNAR Messages	PROF_SUSP_FNAR_SEC	Click the FNAR Messages link on the Profile Suspense Management page.	View the FNAR messages for a student whose record is in suspense.

Using PROFILE Suspense Control

Access the Profile Suspense Management page (Financial Aid, File Management, PROFILE Import, Suspended Records 20nn-20nn, Profile Suspense Management).

Profile Suspense Management			
Petrone,Alexandra T			
Aid Year:	2007	Financial Aid Year 2006 - 2007	CSS ID: 1003173 SSN: 158-70-3559
CSS School Code:	5156	Institution:	PSUNV
Date Application Loaded: 10/05/2005 Date Application Received: 11/02/2005			
Student Information		Processing Action	
Application Source Code: Profile ID: FA919  Date of Birth: 10/30/1980 Student's Admit Level: 0 - Student Not Found Suspend Reason: 6 - Student Id already Exists General Information FNAR Messages		<input type="radio"/> Add to Database (Replace) <input type="radio"/> Add (Do NOT Replace) <input checked="" type="radio"/> Pending <input type="radio"/> Delete from Database	
		Reporting Type	
		<input checked="" type="radio"/> 1st Time Application <input type="radio"/> Subsequent Application <input type="radio"/> Registration Only	

Profile Suspense Management page

The system displays the student's name, aid year, CSS ID, CSS School Code, Institution, SSN (Social Security Number), Date Application Loaded, and Date Application Received.

Student Information

The system displays the student's Date of Birth, Admit Level, and Suspend Reason.

ID	Use to search for a student's ID to confirm whether one already exists in the database. For example, a student may fail your application load process due to a misspelled name or SSN error, but still be in your database.
	Note. Be thorough when searching for a possible existing ID for a student so that you do not risk creating more than one ID for a student.

General Information Click to access the General Information page.

FNAR Messages Click to access the FNAR Messages page.

Processing Action

Add to Database (Replace) Select to move this student from suspense into the database and replace an existing record with the same ID number.

Add to Database (Do NOT Replace) Select to move this student from suspense into the database and not replace an existing record with the same ID number.

Delete from Database Select to remove the student from suspense and from your database.

Reporting Type

1st Time Application Select to see first time applicant records.

Subsequent Application Select to see subsequent applicant records.

Registration Only Registration only records do not load into the database.

Reviewing Institutional Correction Audits

This section discusses how to view institutional correction audits.

Page Used to Review Institutional Correction Audits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Institutional Application Correction Audits	INST_CORR_AUDITS	Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits	Review corrections made to a student's institutional application using the Maintain Institutional Application component. This page enables you to track certain limited changes that you make to a student's institutional application data.

Viewing Institutional Correction Audits

Access the Institutional Application Correction Audits page(Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits).

JONAH OSWEGO		ID:	1007
Aid Year:	2011	Financial Aid Year 2010 - 2011	Institution: PSUNV
Institutional Application Correction Audits		Find View 100	First 1-3 of 113 Last
User ID:	PS	Date/Time:	10/09/2009 1:17:33PM
Record Name:	INST_PARENT	Field Name:	ADJ_TO_INCOME
Old Value:	666666	New Value:	0
Source:	Profile		
User ID:	PS	Date/Time:	10/09/2009 1:17:33PM
Record Name:	INST_PARENT	Field Name:	AFDC_BENEFITS
Old Value:	666666	New Value:	0
Source:	Profile		
User ID:	PS	Date/Time:	10/09/2009 1:17:33PM
Record Name:	INST_PARENT	Field Name:	AGI_PAR_INST
Old Value:	666666	New Value:	45000
Source:	Profile		

Institutional Application Correction Audits page

The system displays the student's name, ID,Aid Year, and Institution.

The system displays the following information relating to a change made to a student's institutional application (PROFILE, Institutional, or Canadian): User ID of the person who made the change, the Date/Time of the change, the application Source for the Old Value, the record and field name of what changed, the original data—Old, and the changed data—New.

Changes are listed in reverse chronological order.

Chapter 24

Processing INAS

The College Board Institutional Needs Analysis System (INAS) is the source for policy options used by Campus Solutions.

To set up federal methodology (FM) and institutional methodology (IM), use the INAS Global Options component (LOCAL_POLICY_PT_nn). This component defines the global policy options for both FM and IM. As you define your policy options, select the options for the majority of your student population. You can override global policy options on a student-by-student basis using extensions.

This chapter describes how to:

- Define federal and institutional methodologies (FM and IM).
- Use FM and IM extensions to override options.
- Override estimated FM expected family contribution (EFC).
- Use EFC values.
- Use INAS simulation.
- Use INAS batch calculations.
- View federal EFC information.
- View institutional EFC information.
- Review need summary.
- Review INAS assumption codes.

Defining Federal and Institutional Methodologies

This section provides an overview of IM and FM and discusses how to:

- Define global and federal options.
- Use EFC proration options.
- Define FM budget durations.
- Define IM budget durations.
- Define IM tax and assessment parameters.

- Define EFM yes and no options.
- Define IM value parameters 1.
- Define IM value parameters 2.
- Define IM yes and no options.
- Define minimum student contribution.
- Define asset options.
- Define home and asset projections.
- Define minimum parental contribution.
- Define budget options.

Understanding IM and FM

IM is based on The College Scholarship Service—Institutional Methodology formula. Refer to the *College Board INAS Users Manual* provided with this application for details regarding the setup and use of the fields in the INAS Global Policy Option component.

Note. With the exception of the first page, all pages in this component are related to IM specific processing.

For federal methodology, you use this component to set EFC proration options and budget durations.

Pages Used to Define FM and IM

Note. The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Global and Federal Options	INAS_LCL_PLCY1_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Global and Federal Options	Define your global policy options for the majority of your student population. You can override these options on a student-by-student basis. The options affect your INAS calculations. The system sets the CSS Base Rules/Values by default. You can enter values for additional INAS rule sets developed by your institution.

Page Name	Definition Name	Navigation	Usage
EFC Proration Options (expected family contribution proration option)	INAS_FM_PRORTN_SEC	Click the EFC Proration Options link on the Global and Federal Options page.	Define your proration parameters.
FM Budget Durations	INAS_FM_DUR_SEC	Click the FM Budget Durations link on the Global and Federal Options page.	Define global options for federal academic and nonstandard budget durations.
IM Budget Durations	INAS_IM_DUR_SEC	Click the IM Budget Durations link on the Global and Federal Options page.	Define global options for institutional academic and nonstandard budget durations.
IM Tax/Assess Parm (institutional methodology tax assessment parameters)	INAS_LCL_PLCY2_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Tax/Assess Parm	Define IM INAS calculation options for parents and students
EFM Yes/No Options (estimated federal methodology yes/no options)	INAS_LCL_PLCY3_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, EFM Yes/No Options	Define EFM INAS calculation options for parents and students.
IM Value Parm 1 (institutional methodology value parameters 1)	INAS_LCL_PLCY4_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Value Parm 1	Define IM INAS calculation options for parents and students.
IM Value Parm 2 (institutional methodology value parameters 2)	INAS_LCL_PLCY11_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Value Parm 2	Define value parameters for multi-college enrollment to define treatment for more than one student in college.
IM Yes/No Options (institutional methodology yes/no options)	INAS_LCL_PLCY10_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Yes/No Options	Define IM INAS calculation options for parents and students.

Page Name	Definition Name	Navigation	Usage
Minimum SC Income (minimum student contribution income)	INAS_LCL_PLCY5_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Minimum SC Income	Define the minimum institutional student contribution values for dependent students and independent students.
Asset Options	INAS_LCL_PLCY6_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Asset Options	Define options and limitations for assessing parent and student assets other than the home.
Home/Asset Projections	INAS_LCL_PLCY7_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Home/Asset Projections	Define options and values for assessing home equity for parents and students. Define asset assessment rates.
Minimum PC Range (minimum parental contribution range)	INAS_LCL_PLCY8_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Minimum PC Range	Define institutional minimum parental contribution values based on income ranges.
Budget Options	INAS_LCL_PLCY9_nn	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Budget Options	Define allocation of total parental contribution to children on the basis of educational costs.

Defining Global and Federal Options

Access the Global and Federal Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Global and Federal Options).

Global and Federal Options		IM Tax/Assess & Parms	EFM Yes/No Options	IM Value Parms 1	IM Value Parms 2
Aid Year: 2010 Financial Aid Year 2009 - 2010		Institution: PSUNV			
Find View All First 1 of 2 Last					
INAS Rule Set: CSS Rules/Values					
Global					
INAS Data Source: Institutnl		INAS Calc Type: IM			
Federal					
Calc Fed Tax - Student		<input type="checkbox"/>			
Calc Fed Tax - Parent		<input type="checkbox"/>			
Calc PC For Independent		<input type="checkbox"/>			
Institutional					
Use Which EFC: Inst.		<input type="checkbox"/>			
Application Source: Profile		<input type="checkbox"/>			
State:		<input type="checkbox"/>			

Global and Federal Options page

Use this page to set INAS calculation options for ISIR records or Profile records.

With the delivery of IM each year, the INAS Data Source and INAS Calc Type values are limited to Institutional and IM. After FM is delivered, the values of Federal, Both F/I, FM and FM & IM are available as additional processing options.

INAS Rule Set

Select the INAS rule set.

The INAS rule set value enables full flexibility to determine how need analysis is processed for different academic careers or academic programs; it is linked to a specific academic career or program through the valid careers for aid year and valid programs for aid year tables. Your institution can create additional INAS rule sets. The INAS rule set refers to the INAS base rules delivered with the Financial Aid system. Values are: *CSS Rules/Values*, *Health Professional*, and *Undergraduate/Graduate*.

Global

Use the Global group box to define the parameters that control general processing options related to methodologies used.

INAS Data Source

Select the INAS data source for the INAS process to use to retrieve student information. Select:

Both F/I (both federal and institutional) to use both sets of data to calculate INAS for either Profile or ISIR records.

Federal to use only federal data to calculate INAS for ISIR records only.

Institutnl (institutional) to use only institutional data to calculate INAS for PROFILE records only.

INAS Calc Type (INAS calculation type) Select the INAS calculation type:

FM (federal methodology) to calculate INAS for ISIR records only.

FM & IM (federal methodology and institutional methodology) to calculate INAS for either PROFILE or ISIR records.

IM (institutional methodology) to calculate INAS for PROFILE records only.

Federal

Use the Federal group box to define how INAS processes federal ISIR data.

Calc Fed Tax - Student (calculate federal tax - student) Select to calculate and display federal tax for the student as defined by INAS.

Calc Fed Tax - Parent (calculate federal tax - parent) Select to calculate and display federal tax for the parent as defined by INAS.

Calc PC For Independent (calculate parental contribution for independent) Select to calculate a parental contribution for independent students if parental data is available. Parental contribution is calculated but not added to the EFC.

For more information, see the College Board *INAS User Manual*.

FM Budget Durations Click this link to access the FM Budget Durations page, which shows academic and non-standard durations for both dependent and independent students.

EFC Prorations Options Click this link to access the EFC Proration Options page.

Institutional

Use the Institutional group box to define how INAS computes your IM.

Use Which EFC Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Values are:

Est Fed (estimated federal methodology): Select to display and use the EFM-EFC.

Greatest: Select to compare base, IM with options, and estimated federal EFC, and then use the greatest EFC value of the three.

Inst W/Opt: Select to use the IM-EFC as a result of the calculation of IM with options.

Inst: Select to use the IM-EFC as a result of the base IM calculations.

Application Source	Select an application source. Values are: <i>FT CSL</i> (full-time Canada Student Loan): Used in Canadian Need Analysis. <i>Inst App</i> (institutional application). <i>NA</i> (Need Access). <i>PT CSL</i> (part-time Canada Student Loan): Used in Canadian Need Analysis. <i>Profile</i> .
State	Select the state in which your institution is located. INAS uses this field to determine a student's budget requirements.

Using EFC Proration Options

Access the EFC Proration Options page (click the EFC Proration Options link on the Global and Federal Options page).

INAS Local Policy Options

EFC Proration Options

INAS Rule Set:

CSS Rules/Values

FM EFC Proration Options

EFC Proration Method:

Adjust Based on Total EFC

Non-Standard Months:

FA Term Based

EFC Proration Options page

EFC Proration Method Select one of the following:

Adjust Based on Total EFC: If you select this option, the system displays the Non-Standard Months field. The system adjusts the EFC based on the total number of budget duration months for the academic and nonstandard award periods. You can use the default functionality by selecting FA Term Based for Non-Standard Months or force the use of leading or trailing months to determine the nonstandard award period contribution regardless if the nonstandard term leads or trails.

Proportion Monthly Share: If you select this option, the system uses the total EFC based on the total number of budget duration months for academic and nonstandard and distributes the EFC proportionally between the award periods.

Use Monthly EFC: If you select this option, the system uses the actual monthly EFC based on the total number of budget duration months for each award period. For example, if academic budget duration is set to 9 and nonstandard is set to 2, then the system uses the actual 9-month EFC for academic and the actual 2-month EFC for nonstandard. No calculations are performed to subtract one or the other from the total EFC.

Note. Using this method might cause your total EFC to exceed the 12-month EFC.

Non-Standard Months The system uses this field in conjunction with the EFC Proration Method, *Adjust Based on Total EFC*. Select from:

FA Term Based: Determines which award period leads based on terms set in FA Term and award period designation in Valid Terms for Careers.

Leading Months: Treats the nonstandard term as leading regardless of nonstandard term designation in FA Term.

Trailing Months: Treats the nonstandard term as trailing regardless of nonstandard term designation in FA Term.

Defining FM Budget Durations

Access the FM Budget Durations page (click the FM Budget Durations link on the Global and Federal Options page).

INAS Local Policy Options

FM Budget Durations

INAS Rule Set: CSS Rules/Values

FM Budget Durations

Dependent Students

Academic:

9

Non-Standard:

0

Total:

9

Independent Students

Academic:

9

Non-Standard:

0

Total:

9

FM Budget Durations page

Dependent Students

Academic

Enter the number of months for the academic term to be considered during need analysis for dependent students.

Non-Standard

Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.

Independent Students

Academic

Enter the number of months for the academic term to be considered during need analysis for independent students.

Non-Standard

Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

Defining IM Budget Durations

Access the IM Budget Durations page (click the IM Budget Durations link on the Global and Federal Options page).

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INAS Local Policy Options			
IM Budget Durations			
INAS Rule Set:		CSS Rules/Values	
IM Budget Durations			
Dependent Students			
Academic:	<input type="text" value="9.0"/>	Non-Standard:	<input type="text" value="0.0"/>
Total:		9.0	
Independent Students			
Academic:	<input type="text" value="9.0"/>	Non-Standard:	<input type="text" value="0.0"/>
Total:		9.0	

IM Budget Durations page

Dependent Students

Academic Enter the number of months for the academic term to be considered during need analysis for dependent students.

Non-Standard Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.

Independent Students

Academic Enter the number of months for the academic term to be considered during need analysis for independent students.

Non-Standard Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

Defining IM Tax and Assessment Parameters

Access the IM Tax/Assess & Parms page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Tax/Assess Parms).

Global and Federal Options	IM Tax/Assess & Parms	EFM Yes/No Options	IM Value Parms 1	IM Value Parms 2	IM Yes/No Options
Aid Year: 2010 Financial Aid Year 2009 - 2010		Institution: PSUNV			
Find View All First 1 of 2 Last					
INAS Rule Set: CSS Rules/Values					
Institutional					
Use Parent AGI:	CSS Deflt	Rstrct # Household - Max Age:		<input type="text"/>	
Adjust IPA/MMA Regional COL:	No	Rstrct # in College - Max Age:		<input type="text"/>	
Adjust ERA Regional COL:	No	Student Assets as Family Assets:		Separate	
ASG Total Income Percentage:	1.52%				
Select Available Income Table:	New				
STUDENT					
Fed Tax Allwnc Against Income:	CSS Rules	Income Assmnt Rate for Dep:		0.50	
Use 70% Income Assmnt for Ind?	Yes				
PARENT					
Fed Tax Allwnc Against Income:	CSS Rules				

IM Tax/Assess & Parms page

The system displays the aid year and institution.

Institutional

Use Parent AGI (use parent adjusted gross income)

Select how the parent AGI is represented. Values are:

CSS Deflt (CSS default)

Use Cmptd (use computed)

Use Rptd (use reported)

Use TaxRtrn (use tax return)

Adjust IPA/MMA Regional COL (adjust income protection allowance/monthly maintenance allowance regional cost of living)

Select to adjust the cost of living calculation based on regional COL differences for an independent student or for the parent of a dependent student. Values are:

No

Stu/Par (student/parent)

Yes Par (yes parent)

Yes Stu (yes student)

Adjust ERA Regional COL (adjust emergency reserve allowance regional cost of living)

Select to adjust the emergency reserve allowance for both students and parents, for independent students, or for parents only. Values are:

No

Yes-Both

Yes-Indep (yes independent)

Yes-Parent

ASG Total Income Percentage (annual savings goal total income percentage) Select a value for the ASG total income percentage. This percentage is used as an allowance against income. The default value is *1.52%*. Selecting one of the other values (*1.14%* or *1.35%*) changes the minimum value used for cumulative education savings allowance (CESA).

This table lists the ASG of total income percentages, the corresponding maximum allowance caps, and CESA minimum values that are current as of aid year 2010–2011.

ASG Total Income Percentage	Maximum Allowance Cap	CESA Minimum Value
1.52%	2,770 USD	23,130 USD
1.14%	1,360 USD	17,300 USD
1.35%	1,800 USD	20,590 USD

Select Available Income Table Optionally select the old Available Income Assessment Rate table. Values are *New* or *Old*.

Rstrct # Household - Max Age (restrict number in household - maximum age) Enter the value. You can restrict the family size used in the calculation by establishing an age threshold for siblings or dependents. For example, the calculation would not include an allowance for a member in the household over the maximum age set by the institution.

Rstrct # in College - Max Age (restrict number in college - maximum age) Enter the value. You can restrict the number in college used in the calculation by establishing an age threshold for family members in college. For example, the calculation would not include an allowance for a member of the household in college over the maximum age set by the institution.

Student Assets as Family Assets(student assets as family assets)

Select *5%-25%* to have the EFC calculation process assess student assets at 5 percent and the student's trust funds at 25 percent when calculating the student contribution portion of the EFC.

Select *All Assets* to have all of the student's assets count as parent assets. Student assets are summed in the parent column. These calculation adjustments occur:

1. Family Total Net Worth (FTNW) $FTNW = \text{Parents' Total Net Worth (NW)} + \text{Student's Total NW}$.
2. Family Discretionary Net Worth (FDNW) $FDNW = FTNW - \text{Asset Protection Allowances}$.
3. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where PC (parental contribution) = PCI (parent contribution from income) + FCA, and TFC (total family contribution) = $PC + SCI$ (student contribution from income).
4. In the student column, student assets equal zero and student contribution (SC) = SCI , because all student assets have been moved to the parent column.

Select *Not Trusts* to have all of the student's assets except for the value of trust funds count as parent assets. The only student assets summed in the student column are trust funds. These calculation adjustments occur:

1. Family Total Net Worth (FTNW) $FTNW = \text{Parents' Total Net Worth (NW)} + (\text{Student's Total NW} - \text{Student's Value of Trusts})$.
2. Student Contribution From Assets (SCA) $SCA = \text{Student's Value of Trusts} * \text{Asset Conversion rate}$.
3. Family Discretionary Net Worth (FDNW) $FDNW = FTNW - \text{Asset Protection Allowances}$.
4. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where: PC (parental contribution) = PCI (parent contribution from income) + FCA, SC (student contribution) = SCI (student contribution from income) + SCA, and TFC (total family contribution) = $PC + SC$.

Select *Separate* to use the default calculation. Parent assets are summed in the parent column and student assets are summed in the student column. If you leave this field blank, the system automatically enters *Separate* and uses the default calculation.

Important! If you selected the Calc PC for Independent check box on the Global and Federal Options page or the IM Yes/No Options page, then the system ignores the value in the Student Assets as Family Assets field, and instead uses the default calculation.

STUDENT

Fed Tax Allwnc Against Income (federal tax allowance against income)	<p>Select from these values to calculate federal tax allowance against income:</p> <p><i>CSS Rules:</i> According to CSS Rules, if a student's tax filing status is <i>Completed Tax Return</i>, reported tax is used to calculate federal tax allowance against income. If the student's tax filing status is <i>Will File</i>, the lower amount of reported tax or calculated tax is used to calculate the allowance. If reported tax is blank, negative, or invalid, the calculated tax amount is used to calculate the allowance.</p> <p><i>Calc Tax:</i> Select to use the calculated tax amount if a student's tax filing status is <i>Will File</i>; otherwise, CSS Rules apply.</p> <p><i>Reptd Tax</i> (reported tax): If a student's tax filing status is <i>Will File</i>, the reported tax is used to calculate the federal tax allowance against income.</p>
Use 70% Income Assmnt for Ind (use 70 percent income assessment for independent)	<p>This field refers to the available income assessment rate for independent students. Select from these values:</p> <p><i>Yes:</i> Uses 70 percent for income assessment. This is the default.</p> <p><i>No:</i> Select if you elect not to use the 70 percent income assessment; the <i>Alt Income Assessment Rate</i> field appears on the page.</p>
Income Assmnt Rate for Dep (income assessment rate for dependent)	Enter an income assessment rate for dependent students. The default is 50 percent.
Alt Income Assessment Rate (alternate income assessment rate)	Enter an alternate rate for assessing the student's income. This field appears on the page when you select <i>No</i> in the <i>Use 70% Income Assmnt for Ind</i> field.

PARENT

Fed Tax Allwnc Against Income (federal tax allowance against income)	<p>Select from these values to calculate federal tax allowance against income:</p> <p><i>CSS Rules:</i> According to CSS Rules, if a parent's tax filing status is <i>completed tax return</i>, reported tax is used to calculate federal tax allowance against income. If the student's tax filing status is <i>Will File</i>, the lower amount of reported tax or calculated tax is used to calculate the allowance. If reported tax is blank, negative, or invalid, the calculated tax amount is used to calculate the allowance.</p> <p><i>Calc Tax:</i> Select to use the calculated tax amount if a parent's tax filing status is <i>Will File</i>; otherwise, CSS Rules apply.</p> <p><i>Reptd Tax:</i> If a parent's tax filing status is <i>Will File</i>, the reported tax is used to calculate the federal tax allowance against income.</p>
---	---

See Also

College Board *INAS User Manual*

Defining EFM Yes and No Options

Access the EFM Yes/No Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, EFM Yes/No Options).

Global and Federal OptionsIM Tax/Assess & PamsEFM Yes/No OptionsIM Value Pams 1IM Value Pams 2

Aid Year:2010Financial Aid Year2009 - 2010Institution:PSUNV

Find | View AllFirst1 of 2Last

INAS Rule Set:CSS Rules/Values

Institutional

EFM-Profile

STUDENT

☐ Use IM Imputed Asset Value

☐ Use Projected Year Income

☐ Use IM Income Override

☒ Use Profile Assumptions

PARENT

☐ Use IM Imputed Asset Value

☐ Use Projected Year Income

☐ Use IM Income Override

EFM Yes/No Options page

Select the EFM options for the aid year, institution, and selected INAS rule set.

STUDENT

- Use IM Imputed Asset Value

Select to impute the value of EFM assets based on the interest and dividend income reported on the PROFILE form.
- Use Projected Year Income

Select to use the student's expected year earnings instead of base year for EFM.
- Use IM Income Override

Select to use the IM adjusted gross income and untaxed income overrides for the EFM student contribution.

PARENT

- Use IM Imputed Asset Value

Select to impute the value of EFM assets based on the interest and dividend income reported on the PROFILE form.
- Use Projected Year Income

Select to use the parent's expected year earnings instead of base year for EFM.

Use IM Income Override

Select to use the IM's adjusted gross income and untaxed income overrides for the EFM parent contribution.

EFM-Profile**Use Profile Assumptions**

Select to enable the system to perform calculations using assumptions made by the system. For example, if the father reports income of 50,000.00 USD, and the mother reports income of 50,000.00 USD, and the adjusted gross income is left blank, the system assumes the total income to be 100,000.00 USD. The calculation then uses an assumed adjusted gross income of 100,000.00 USD.

See Also

College Board *INAS User Manual*

Defining IM Value Parameters 1

Access the IM Value Parm 1 page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Value Parm 1).

STUDENT		PARENT	
% Employment Allowance:	0.44	% Employment Allowance:	0.44
% Unreimbursed Med/Dent Exp:	0.035	% Unreimbursed Med/Dent Exp:	0.035
Increase Last Year SC:	0.0	Increase Last Year PC:	0.0
% Of Stdnt IRA Include In NW:	0.00	Max Tuft Allowance Per Child:	0
Min Contribution From Asset:	0	Min Contribution From Asset:	0
Max Employment Allowance:	3970	Max Employment Allowance:	3970

IM Value Parm 1 page

Enter the IM values for the aid year, institution, and selected INAS rule set. Use the default values or enter the percentages and values set by your institution for students and parents.

See Also

College Board *INAS User Manual*

Defining IM Value Parameters 2

Access the IM Value Parm 2 page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Value Parm 2).

Global and Federal OptionsIM Tax/Assess & ParmseFM Yes/No OptionsIM Value Parm 1IM Value Parm 2

Aid Year:2010Financial Aid Year2009 - 2010Institution:PSUNV

Multi-College Enrollment PC AllocationFind | View AllFirst1 of 2Last

INAS Rule Set:CSS Rules/Values

OptionsAllocation Percentages: [S] Use Std %Minimum Year in School for Alternate Percentages: []

Percentages

Standard	Alternate-1	Alternate-2
2 in College: 0.600	2 in College: 0.500	2 in College: 0.500
3 in College: 0.450	3 in College: 0.333	3 in College: 0.333
4 in College: 0.350	4 in College: 0.250	4 in College: 0.250

IM Value Parm 2 page

Select the IM options and enter the IM values for the aid year, institution, and selected INAS rule set.

Percentages

The system determines which set of allocation percentages to use (Standard,Alternate-1, or Alternate-2) based on the Allocation Percentages field value, the Minimum Year in School for Alternate Percentages field value, and the student's year in school.

This table illustrates when the system uses each set of allocation percentages:

Percentage Allocation Option	Minimum Year in School for Alternate Percentages	Student's Year in School	Standard Allocation Percentages	Alternate-1 Percentages	Alternate-2 Percentages
Standard Table	If blank	NA	This percentage is used.	NA	NA
Standard Table	If not blank	Is less than Minimum Year in School	This percentage is used.	NA	NA

Percentage Allocation Option	Minimum Year in School for Alternate Percentages	Student's Year in School	Standard Allocation Percentages	Alternate-1 Percentages	Alternate-2 Percentages
Standard Table	If not blank	Is greater than or equal to Minimum Year in School	NA	NA	This percentage is used.
Optional Table	If blank	NA	NA	This percentage is used.	NA
Optional Table	If not blank	Is less than Minimum Year in School	NA	This percentage is used.	NA
Optional Table	If not blank	Is greater than or equal to Minimum Year in School	NA	NA	This percentage is used.

See Also

College Board *INAS User Manual*

Defining IM Yes and No Options

Access the IM Yes/No Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, IM Yes/No Options).

The screenshot shows the 'IM Yes/No Options' page. At the top, there are tabs for 'IM Value Params 2', 'IM Yes/No Options' (selected), 'Minimum SC Income', 'Asset Options', and 'Home/Asset Projections'. Below the tabs, the 'Aid Year' is 2010, 'Financial Aid Year' is 2009 - 2010, and 'Institution' is PSUNV. The 'INAS Rule Set' is set to 'CSS Rules/Values'. The main section is titled 'Institutional' and contains an 'IM-Profile' section with two columns: 'STUDENT' and 'PARENT'. The 'STUDENT' column has checkboxes for 'Use Projected Year Income', 'Use FM Tx', 'Calc PC For Independent', 'Add Non Cust PC to PC', 'Add Hope/LTL', 'IM < FM' (checked), and 'Ind Use Par St Tax Alwnc'. The 'PARENT' column has checkboxes for 'Use Projected Year Income', 'IM < FM' (checked), 'Use Rpt PC', 'Allow Parent Other Loss', 'Allow Parent Bus/Farm Loss', 'Add Hope/LTL', 'Disallow Low Inc Asset Alwnc', and 'Exclude Tuition/Fee Deduction'.

IM Yes/No Options page

The system displays the aid year and institution.

STUDENT

Use Projected Year Income	Select to calculate a projected estimated annual income if it is lower than the reported base year income.
Use FM Tx (use federal methodology tax)	Select to use the FM state and local income tax computation table in the calculation. When this check box is selected in conjunction with the Ind Use Par St Tax Alwnc check box, Use FM Tx takes priority for independent students.
Calc PC For Independent (calculate parental contribution for independent)	Select to use the parents' information in the calculation for an independent student.
Add Non Cust PC to PC (add noncustodial parent contribution to parent contribution)	Select to combine the noncustodial parent's contribution to the parent contribution.
Add Hope/LTL (add Hope/Lifetime Learning Credit)	Select to let the system determine whether to add this value to taxes, based on federal tax allowance against income and tax filing status, as shown in the following table. The column headings represent the value of the Fed Tax Allwnc Against Income field from the IM Tax/Assess Parameters page.

<i>For this Tax Filing Status:</i>	<i>CSS Rules will:</i>	<i>Calc Tax will:</i>	<i>Rptd Tax will:</i>
Completed Return	Add Hope to taxes.	Not add Hope to calculate taxes.	Add Hope to taxes.
Will File Return	Not add Hope to calculate taxes.	Not add Hope to calculate taxes.	Add Hope to taxes.

When the INAS calculates taxes, it compares the values for reported taxes and calculated taxes and uses the lower value in subsequent calculations. This table demonstrates how the system processes the Hope value when reported taxes are lower than calculated taxes:

<i>For this Tax Filing Status:</i>	<i>CSS Rules will:</i>	<i>Calc Tax will:</i>	<i>Rptd Tax will:</i>
Completed Return	Add Hope to taxes.	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes.
Will File Return	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes only if reported is lower than calculated.	Add Hope to taxes.

Note. Reported tax amounts are generally higher than calculated tax amounts.

Alt Min SCI(alternate minimum student contribution from income)

Select to indicate Yes (default), clear to indicate No for this Yes/No option. If the check box is selected, the application performs the Alternate Minimum Student Contribution from Income calculation using the following calculations

1. Multiply the Student's Available Income by the Available Income Assessment Rate (Parent's Marginal Rate from Income Band). For example, 10,000 USD x .22 = 2,200 USD.
2. Compare the result (2,200 USD) to the Student Standard Contribution from Income. For example, 2,150 (Non-First Year Dependent Students) and take the higher of the two amounts. In this case, 2,200.
3. To obtain the Student Contribution Cap multiply the Total Parent Contribution by .50. For example, 6,000 USD x .50 = 3,000 USD.
4. The Minimum Student Contribution from Income is the lesser of the value in Step 2 (2,200 USD) or the Student Contribution Cap (3,000). In this case it is 2,200 USD.

IM < FM(institutional methodology is less than federal methodology)

Select to allow the calculated IM EFC to be below the calculated FM.

Ind Use Par St Tax Allwnc (independent use parent state tax allowance)	Select if the student is independent with dependents but you want to use the parent's state tax allowance table in the calculation. When this check box is selected in conjunction with the Use FM Tx check box, Use FM Tx takes priority for independent students.
---	---

PARENT

Use Projected Year Income	Select to calculate a projected estimated annual income, if it is lower than the reported base year income.
----------------------------------	---

Use FM Tx (use federal methodology tax)	Select to use the FM state and local income tax computation table in the calculation.
--	---

Allow Parent Other Loss	Select to allow losses taken on a parent's income tax. This results in a lower EFC.
--------------------------------	---

Allow Parent Bus/Farm Loss	Select to allow losses taken on a parent's income tax, such as depreciation in a business. This results in a lower EFC.
-----------------------------------	---

Note. By default, the system disallows losses on business, farm, or other. By selecting Allow Parent Other Loss or Allow Parent Bus/Farm Loss, you allow the loss to be included in the calculation.

Add Hope/LTL (add Hope/Lifetime Learning Credit)	Select to have the system determine whether to add this value to taxes based on federal tax allowance against income and tax filing status, as shown in the previous table. The column headings in the table represent the value of the Fed Tax Allwnc Against Income field from the IM Tax/Assess Parameters page.
---	---

Disallow Low Inc Asset Allwnc (disallow low income asset allowance)	Select to calculate without using the low income asset allowance.
--	---

Exclude Tuition/Fee Deduction	<p>Use this check box to determine whether the tuition and fee deductions reported by the parents of dependent students are excluded from parental income:</p> <ul style="list-style-type: none"> • Select to disallow tuition and fee deductions from untaxed income. • Clear to allow tuition and fee deductions from untaxed income.
--------------------------------------	---

IM < FM	Select to allow the calculated IM EFC to be less than the calculated FM.
-------------------	--

Use Rpt PC (use reported parent contribution)	Select to enforce the amount that the parents volunteered to contribute, if that amount is higher than the amount calculated by the system.
--	---

See Also

College Board *INAS User Manual*

Defining Minimum Student Contribution

Access the Minimum SC Income page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Minimum SC Income).

IM Value Parns 2IM Yes/No OptionsMinimum SC IncomeAsset OptionsHome/Asset Projections

Aid Year: 2011Institution: PSUNVFind | View AllFirst1 of 2Last

INAS Rule Set: CSS Rules/Values

Institutional

Use Default Minimum SC Amounts: Yes

Min SC Income - Dependents

Undergrad

1YR: 17501Prv: 23502YR: 23503YR: 23504YR: 23505+YR: 2350

Professional

1YR: 23502YR: 23503YR: 23504YR: 2350

Min SC Income - Independents

Undergrad

1YR: 33001Prv: 33002YR: 33003YR: 33004YR: 33005+YR: 3300

Professional

1YR: 33002YR: 33003YR: 33004YR: 3300

Minimum SC Income page

Enter the minimum institutional student contribution values set by your institution for dependent and independent students for the selected INAS rule set. IM uses a minimum student contribution from income, which you can adjust. The system uses these values to determine whether the calculated or minimum contribution is used.

Institutional

Use Default Minimum Student Contribution Amounts

Select from these values:
Yes: Use the defaults.
No: Make manual changes to the minimum student contribution amounts.

See Also

College Board *INAS User Manual*

Defining Asset Options

Access the Asset Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Asset Options).

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Aid Year: 2010 Financial Aid Year 2009 - 2010 Institution: PSUNV

Find | View All First 1 of 2 Last

INAS Rule Set: CSS Rules/Values

Institutional

	PARENT	STUDENT W/Dep	STUDENT No/Dep
Asset Options:	No Asset Projection	No Asset Projection	No Asset Projection
Cash/Int - Limit:	00000	00000	00000
Cash/Int - Tolerance:	00.0 00.0	00.0 00.0	00.0 00.0
Inv/Dvd - Limit:	00000		
Inv/Dvd - Tolerance:	00.0 00.0		

Asset Options page

The system displays the aid year and institution.

Institutional

Asset Options

Select asset options. Values are:

No Asset Projection: INAS does not impute a value for assets, reported amounts are used.

Combined Projection: INAS combines Cash/Int (cash and interest) and Inv/Dvd (investment and dividends) imputed values in the calculation. The entire amount is reported as cash savings.

Individual Projection: INAS calculates Cash/Int and Inv/Dvd imputed values individually. Cash/Int and Inv/Dvd can have a different yield and tolerance.

You can compare income with reported cash, savings, checking, and investments to identify cases where the asset value appears to be under-reported. Specify both an expected rate of return (yield) and a tolerance level for both Cash/Int and Inv/Dvd. Based on the interest reported, you can impute a value of the parents' or student's cash savings, using the specified yield. This helps you to determine whether the reported savings are under-reported. You can also impute a value for the parents' or student's investments and dividends.

Limit and Tolerance

Enter the limit and tolerance values for Cash/Int.

You can set a limit for cash and interest. For example, you can enter a value of *10,000.00* USD. You can set up the system to assess the first 10,000.00 USD (Limit) at 3.8% (Yield% 1) and any portion greater than 10,000.00 USD at 5.6% (Yield% 2). Based on the reported interest from the tax return, if the value is less than 10,000.00 USD, the system uses the percentage that appears in Yield% 1 in calculation. The system uses the percentage in Yield% 2 in the calculation for the amount above 10,000.00 USD. If the tolerance is set to 500.00 USD, and the imputed value when compared to the reported value is within the specified tolerance, you can decide to use the reported value. INAS uses the reported income and the expected rate of return to project the asset value required to produce that income. If the projected value is greater than the reported asset value by more than the tolerance level, the projected value is substituted for the reported asset value.

Inv/Dvd (investment and dividend)

Set up the appropriate limit and tolerance to compare the reported value to the imputed value, as described previously.

Note. The Asset Option Ind Proj (asset option individual projection) field is not available for students.

See Also

College Board *INAS User Manual*

Defining Home and Asset Projections

Access the Home/Asset Projections page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Home/Asset Projections).

Aid Year: 2010 **Financial Aid Year** 2009 - 2010 **Institution:** PSUNV

INAS Rule Set: CSS Rules/Values

Institutional

Home Projection	PARENT	IND STUDENT
Home Option:	1 Reported	1 Reported
Home Tolerance:	00000	00000
Home Cap:	999	999
Home Equity Cap Factor		

Asset Assessment Rate

Asset % Dep: 0.25 (Leave These Two Entries Blank To Invoke Standard IM Rules -- Else Provide Value Between 000/100)

Asset % Ind No Dep-Married: 0.25

Asset % Ind No Dep-Single: 0.25 **Asset % Parent:** **Asset % Ind W/Dep:**

Home/Asset Projections page

The system displays the aid year and institution.

Institutional

Home Option

Select the home option for parents and independent students. Values are:

- 1: Reported. INAS uses the value of the home reported on the application, to calculate equity.
- 2: Projected. The system calculates the value of the home based on the purchase price of the home and the date on which it was purchased, using the Federal Housing Multiplier table.
- 3: Projected if Significant Difference. The system uses the value set for home tolerance to determine whether reported or projected home values are used to determine home equity.
- 4: Highest. INAS compares the calculated and reported home value. The system uses the higher value to determine equity.
- 5: Alt Home Value Calculation. INAS compares projected value to capped value and uses the lower value.

Home Tolerance

Enter a home tolerance value. INAS uses the reported value of the home, unless it exceeds the tolerance when the difference is compared to the calculated home value. If it exceeds the tolerance, the value is adjusted accordingly.

Home Cap

Enter a multiplier if you do not want the reported value or the computed value to exceed a certain multiple of the family's income. The system multiplies this value with total income to adjust the value of the home.

Home Equity Cap Factor	Enter a cap factor from 0.0 to 9.9. Home equity is then capped using the factor times the computed income.
-------------------------------	--

Asset Assessment Rate

Asset % Dep (asset percentage dependent)	Enter a value to use as an allowance against assets.
---	--

Asset % Ind No Dep-Married (asset percentage independent no dependents married)	Enter a value to use as an allowance against assets.
--	--

Asset % Ind No Dep-Single (asset percentage independent no dependents single)	Enter a value to use as an allowance against assets.
--	--

Asset % Parent (asset percentage parent)	Enter a value to use as an allowance against assets. Leave this field and the Asset % Ind W/Dep field blank to invoke standard IM rules.
---	--

Asset % Ind W/Dep (asset percentage independent with dependents)	Enter a value to use as an allowance against assets. Leave this field and the Asset % Parent field blank to invoke standard IM rules.
---	---

See Also

College Board *INAS User Manual*

Defining Minimum Parental Contribution

Access the Minimum PC Range page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Minimum PC Range).

Aid Year: 2010 Financial Aid Year 2009 - 2010 Institution: PSUNV

Find | View All First 1 of 2 Last

INAS Rule Set: CSS Rules/Values

Institutional

Range	Total Income Up To	Minimum PC
1	000000	000000
2	000000	000000
3	000000	000000
4	000000	000000
5	000000	000000
6	000000	000000
7	000000	000000

Minimum PC Range page

Use this page to select the minimum parental contribution for the aid year, institution, and selected INAS rule set.

MINIMUM PC BASED ON INCOME RANGE Enter the values set by your institution's policy.
(minimum parental contribution based on income range)

See Also

College Board *INAS User Manual*

Defining Budget Options

Access the Budget Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Budget Options).

Institutional	
Budgets: Re maximizing other family members' share of total PC based on an average of total budget, by educational sector.	
% of Total Budget for 1/2 time:	1.00
Limit PC:	No
2yr Public Institution:	14,054
2yr Private Institution:	24,901
4yr Public Institution:	18,326
In State Undergrad:	14,118
Out of State Undergrad:	18,856
4yr Private Institution:	37,390
Grad/Prof Institution:	20,000
Proprietary Institution:	6,599
In State Graduate:	16,118
Out of State Graduate:	20,856

Budget Options page

The system displays the aid year and institution.

Institutional

% of Total Budget for 1/2 time(percentage of total budget for half-time)

Enter a percentage of the total budget that you want to use for a student attending an institution half-time.

Note. The value *1.00* is equal to 100 percent.

Limit PC(limit parental contribution)

Select a parental contribution limit. Values are:

% Tot Bdgt (percentage of total budget): Select to have the parental contribution limited to the percentage (calculated as follows: budget total for other children divided by budget total for all children) that their total budget compared to the total budget including the applicant.

Lowest: Compare the parental contribution limits set by *% Tot Bdgt* and *Sum Bdgt*, and set the limit to the higher value.

No: Indicate that no parental contribution limit is set.

Sum Bdgt (sum budget): Limit the parental contribution to the sum of the budgets for all other children in the family.

Enter the values that your institution set for each type of institution.

See Also

College Board *INAS User Manual*

Using FM and IM Extensions to Override Options

This section reviews overriding global policy options at the student level. FM and IM extensions can be accessed from ISIR corrections, INAS simulation, or the Maintain Institutional Application component. This section discusses how to:

- Override INAS federal extension options.
- Override INAS institutional extension options 1.
- Override INAS institutional extension options 2.
- Override INAS institutional extension options 3.
- Override INAS institutional extension options 4.
- Override INAS institutional extension options 5.

See [Chapter 22, "Processing Federal Financial Aid Applications," Making ISIR Corrections, page 617.](#)

See [Chapter 23, "Processing and Using Institutional Financial Aid Applications," page 663.](#)

Pages Used to Override Options in ISIR Corrections

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FAFSA Information	ISIR_PIA_CS1_nn	Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, FAFSA Information	Correct information on the FAFSA Information page and access FM and IM extension pages.
INAS Federal Extension	INAS_FED_EXTnn_SEC	Click the FM link on the FAFSA Information page.	Override INAS global policy options.
INAS Federal Extension Budget Durations	INAS_FEDEX_DUR_SEC	Click the Budget Durations link on the INAS Federal Extension page.	Override INAS global policy options for federal academic and non-standard budget duration.
INAS Federal Extension EFC Proration Options	INAS_FEDEX_PRO_SEC	Click the EFC Proration Options link on the INAS Federal Extension page.	Override EFC proration options for academic and non-standard months.
INAS Federal Extension EFC Override	INAS_FEDEX_EFC_SEC	Click the Override Federal EFC link on the INAS Federal Extension page.	Override EFC components for academic and non-standard award periods.

Page Name	Definition Name	Navigation	Usage
INAS Institutional Extension 1	INAS_PROF_EXT1_Snn	Click the IM link on the FAFSA Information page.	Override INAS global policy options.
Institutional Budget Durations	INAS_PRFX_DUR_SEC	Click the Budget Durations link or the Override Institutional EFC link on the INAS Institutional Extension 1 page.	Override INAS global policy options for institutional academic and non-standard budget duration.
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the Override Institutional EFC link on the INAS Institutional Extension 1 page.	Override EFC components for academic and non-standard award periods.
INAS Institutional Extension 2	INAS_PROF_EXT2_Snn	Click the IM Extension 2 link on the INAS Institutional Extension 1 page.	Override INAS global policy options.
INAS Institutional Extension 3	INAS_PROF_EXT3_SEC	Click the Extension 3 link on the INAS Institutional Extension 1 page.	Override INAS global policy options.
INAS Institutional Extension 4	INAS_PROF_EXT4_Snn	Click the Extension 4 link on the INAS Institutional Extension 1 page.	Override INAS global policy options.
INAS Institutional Extension 5	INAS_PROF_EXT5_SEC	Click the Extension 5 link on the INAS Institutional Extension 1 page.	Override INAS global policy options.
Monthly EFC	NEED_SMRY_EFC_SEC	Click the Monthly EFC link on the ISIR Corrections EFC/DB Matches page.	View the monthly breakdown of the expected family contributions for months 1–8 and 10–12. The 9–month EFC displays on the EFC/DB Matches\Corr page.

Overriding INAS Federal Extension Options

Access the INAS Federal Extension page (click the FM link on the FAFSA Information page).

INAS Federal Extension		STUDENT	PARENT
Federal			
INAS Rule Set:	CSS Rules ▼		
INAS Calc Type:	FM & IM ▼		
INAS Data Source:	Both F/I ▼		
Dependency Override:	No ▼		
<input type="checkbox"/> Calc a PC for Independent			
Budget Durations			
EFC Proration Options			
Override Federal EFC			
Allowances			
Calculate Federal Tax:		<input type="checkbox"/>	<input type="checkbox"/>
Tuition:		<input type="text"/>	<input type="text"/>
Medical/Dental:		<input type="text"/>	<input type="text"/>
Other:		<input type="text"/>	<input type="text"/>
Asset Allowance:		<input type="text"/>	<input type="text"/>
Assets			
Other:		<input type="text"/>	<input type="text"/>
Assumption Overrides			
Number in College:		<input type="text"/>	
Reject Overrides			
Reject D Override		<input type="text"/>	
Reject E Override		<input type="text"/>	
Reject F Override		<input type="text"/>	
Reject R Override:		<input type="text"/>	
Reject S Override:		<input type="text"/>	
Reject T Override:		<input type="text"/>	

INAS Federal Extension page

Federal

INAS Rule Set	Select a rule set.
INAS Calc Type (INAS calculation type)	Select a calculation type from <i>FM</i> , <i>IM</i> , or <i>FM & IM</i> .
INAS Data Source	Select <i>FM</i> , <i>IM</i> , or <i>Both F/I</i> .
Dependency Override	Select either <i>Ind Prof J</i> (individual professional judgement) or <i>No</i> (no override).
Calc a PC for Independent (calculate a parent contribution for independent)	Select to calculate a parental contribution for independent students if parental data is available. The parental contribution is calculated but not added to the EFC.
Override Federal EFC	See Chapter 24, "Processing INAS," Overriding Expected Family Contribution (EFC), page 749.

Budget Durations Click this link to access the INAS Federal Extension Budget Durationspage. You can enter any value for FM budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9-month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period.

Allowances

Calculate Federal Tax Select to calculate federal tax as defined by INAS.

Tuition Enter a value to offset tuition expenses.

Medical/Dental Enter a value to offset medical/dental expenses.

Other Enter a value to offset total allowances.

Asset Allowance Enter a value to include in net worth calculations.

Assets

Other Enter a value to include in net worth calculations.

Assumption Overrides

Number in College Select one of the following:
Ovr'd Asmpt (override assumption) to override the number in college assumption when calculating the parent contribution.
Don't Ovr (don't override) to accept the number in college assumption when calculating the parent contribution.

Reject Overrides

Reject D Override Select *Don't Supp* (Do not suppress) to enforce Reject D.
 Select *Supp Rej D* (suppress reject D) to override Reject D.

Reject E Override Select *Don't Supp* (Do not suppress) to enforce Reject E.
 Select *Supp Rej E* (suppress reject E) to override Reject E.

Reject F Override Select *Don't Supp* (Do not suppress) to enforce Reject F.
 Select *Supp Rej F* (suppress reject F) to override Reject F.

Reject R Override	Select <i>Don't Supp</i> (Do not suppress) to enforce Reject R. Select <i>Supp Rej R</i> (suppress reject R) to override Reject R.
Reject S Override	Select <i>Don't Supp</i> (Do not suppress) to enforce Reject S. Select: <i>Supp Rej S</i> (suppress reject S) to override Reject S.
Reject T Override	Select <i>Don't Supp</i> (Do not suppress) to enforce Reject T. Select <i>Supp Rej T</i> (suppress reject T) to override Reject T.

See the College Board *INAS User Manual*.

Overriding INAS Institutional Extension Options 1

Access the INAS Institutional Extension 1 page (click the IM link on the FAFSA Information page).

INAS Institutional Extension 1

INAS Rule Set: Ugrad/Grad
[Extension 2](#)
[Extension 3](#)
[Extension 4](#)
[Extension 5](#)
Delete

Application Source: Profile
☒ **Alt Min SC from Income Calc**
IGNORE LOSSES

[Budget Durations](#)
☐ **Calc PC For Independent**
☐ **Business/Farm**

[Override Institutional EFC](#)
☐ **Skip Family Member Exclusion**
☐ **Other**

☐ **Work Study Income Exclusion**
☐ **Limit Intl Student's IPA**
☐ **Country Coefficient TCA**

	STUDENT	PARENT
Use Projected Year Income:	<input type="checkbox"/>	<input type="checkbox"/>
Can IM Contribution Fall Below FM:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hope/Lifetime Add Back:	<input type="checkbox"/>	<input type="checkbox"/>
Parent Tax Table - Independent:	<input type="checkbox"/>	
Exclude Tuition/Fee Deduction:		<input type="checkbox"/>

INAS Institutional Extension 1 page

Use the INAS Institutional Extension 1 page to set your basic overrides. From this page, access other extension pages, budget duration or EFC overrides.

INAS Rule Set	Select an INAS rule set value to determine which global policy option rule to use as a base.
----------------------	--

Application Source	<p>Select an application source from:</p> <p><i>FT CSL</i> (full-time Canada Student Loan): Used in Canadian Need Analysis.</p> <p><i>Inst App</i> (institutional application).</p> <p><i>NA</i> (Need Access).</p> <p><i>PT CSL</i> (part-time Canada Student Loan): Used in Canadian Need Analysis.</p> <p><i>Profile</i>.</p>
Budget Durations	Click this link to access the Institutional Budget Durations page. You can enter any value for IM budget duration. Institutional rules allow whole numbers with one decimal place.
Override Institutional EFC	Click this link to access the Override Institutional EFC page, where you can override the institutional EFC amount, as described later in this chapter.
Alt Min SC from Income Calc (alternate minimum student contribution from income calculation)	Select this check box to override the Alt Min SCI option set for the student on the IM Yes/No Options page.
Calc PC For Independent (calculate parental contribution for independent)	Select this check box to override the Calc PC For Independent option set for the student on the IM Yes/No Options page.
Skip Family Member Exclusion	Select to override the Rstrct # Household - Max Age and Rstrct # in College - Max Age options set on the IM Tax/Assess & Parms options page.
IGNORE LOSSES—Business/Farm	Select to override the Allow Parent Bus/Farm Loss option set on the IM Yes/No Options page.
IGNORE LOSSES—Other	Select to override the Allow Parent Other Loss option set on the IM Yes/No Options page.
Work Study Income Exclusion	<p>Select to exclude the student's work-study earnings from the income exclusion calculation. This option allows (includes) federal workstudy income back into regular income by excluding it from the income exclusion calculation.</p> <ul style="list-style-type: none"> • <i>Selected</i> <p>Include work-study earnings in regular income.</p> • <i>Unselected</i> <p>Do not include work-study earnings in regular income.</p>

Limit Intl Student's IPA (Limit International Student's Income Protection Allowance)	<p>Select to limit an international student's Income Protection Allowance (IPA) to an amount greater than or equal to 25% of the parental income.</p> <ul style="list-style-type: none"> <i>Selected</i> <p>Limit student's IPA to an amount not less than 25% of parents' income.</p> <ul style="list-style-type: none"> <i>Unselected</i> <p>Do not limit student's IPA amount, normal processing.</p> <hr/> <p>Note. This is a local-only option applicable to international (non-domestic) students only.</p> <hr/>
Country Coefficient TCA (Country Coefficient Total Contribution from Assets)	<p>Select to calculate an optional contribution from assets by applying the country coefficient to the percentage used to calculate the step increment</p> <ul style="list-style-type: none"> <i>Selected</i> <p>Calculate contribution from assets applying the country coefficient to the step increment percentage.</p> <ul style="list-style-type: none"> <i>Unselected</i> <p>Calculate contribution from assets for international student using default step increase percentage.</p> <hr/> <p>Note. This is a local-only option applicable to international (non-domestic) students only.</p> <hr/>
Use Projected Year Income	Select to override the Use Projected Year Income option set on the IM Yes/No Options page.
Can IM Contribution Fall Below FM	Select to override the IM < FM option set on the IM Yes/No Options page.
Hope/Lifetime Add Back	Select to override the Add Hope/LTL option set on the IM Yes/No Options page.
Parent Tax Table — Independent	Select to override the Ind Use Par St Tax Alwnc (independent use parent state tax allowance) option set on the IM Yes/No Options page.
Exclude Tuition/Fee Deduction	Select to override the Exclude Tuition/Fee Deduction option set on the IM Yes/No Options page.

See [Chapter 23, "Processing and Using Institutional Financial Aid Applications," page 663.](#)

See the College Board *INAS User Manual*.

Overriding INAS Institutional Extension Options 2

Access the INAS Institutional Extension 2 page (click the IM Extension 2 link on the INAS Institutional Extension 1 page).

INAS Institutional Extension 2

Use Which EFC:

InstWOpt

Dependency Override:

Limit Share of PC:

Total Budget:

STUDENT

Calculate U.S. Tax:

Override Imputation Of Home:

Override Imputation Of Assets:

Use Parent AGI:

Student Assets as Family Assets :

CSS Rules

Reported

No Projctn

Separate

PARENT

CSS Rules

Reported

No Projctn

CSS Deftt

INAS Institutional Extension 2 page

Use the INAS Institutional Extension 2 page to override options used to determine the student's total budget.

- Use Which EFC

Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Your selection overrides the value selected on the Global and Federal Options page.
- Dependency Override

Select either *Ind Prof J* (individual professional judgement) or *No* (no override). INAS calculates a dependent student as independent when Ind Prof J is selected.
- Limit Share of PC

Select from *Lowest*,*No*, *Ratio Bdg* (ratio budget), or *Sum of Bdg* (sum of budget).
Your selection overrides the value selected on the Minimum PC Range page and the Budget Options page.
- Calculate U.S. Tax

Select to override the value selected for the Fed Tax Allwnc Against Income field on the IM Tax/Assess & Parms page.
- Override Imputation of Home

Select from Alt Calc,Highest, Proj/Diff,Projected, or Reported to override the value on the Home/Asset Projections page.
- Override Imputation of Assets

Select Combined or No Projctn to override the value on the Asset Options page.

Use Parent AGI (use parent adjusted gross income)

Select a value to override the value selected for the Use Parent AGI field on the IM Tax/Assess & Parms page.

Select how the parent AGI is represented from:

CSS Deflt (CSS default)

Use Cmptd (use computed)

Use Rptd (use reported)

Use TaxRtrn (use tax return)

Student Assets as Family Assets(student assets as family assets)

Select a value to override the value selected for the Studnt Assets as Family Assets field on the IM Tax/Assess & Parms page.

Overriding INAS Institutional Extension Options 3

Access the INAS Institutional Extension 3 page (click the Extension 3 link on the INAS Institutional Extension 1 page).

	STUDENT	PARENT
Adjusted Gross Income:	<input type="text"/>	<input type="text"/>
Untaxed Income:	<input type="text"/>	<input type="text"/>
Tax Paid:	<input type="text"/>	<input type="text"/>
Estimated Tax:	<input type="text"/>	<input type="text"/>
Cost of Living Allowance Index:		<input type="text"/>
Income Protection Allowance:		<input type="text"/>
Allowances		
Tuition:		<input type="text"/>
Medical/Dental:	<input type="text"/>	<input type="text"/>
Employment:	<input type="text"/>	<input type="text"/>
Federal Insurance Compensation:	<input type="text"/>	<input type="text"/>
Income:	<input type="text"/>	<input type="text"/>

INAS Institutional Extension 3 page

Use the INAS Institutional Extension 3 page to override INAS global policy options for the given income, tax, and allowances.

Adjusted Gross Income Enter an amount to override the student or parent adjusted gross income.

Untaxed Income Enter an amount to override the student or parent untaxed income.

Tax Paid	Enter an amount to override the value used in the Fed Tax Allowance Against Income (federal tax allowance against income) on the IM Tax/Assess & Parms page.
Estimated Tax	Enter an amount to override the estimated tax calculated by the IM method.
Cost of Living Allowance Index	Enter an amount to override the Adjust IPA/MMA Regional COL (Income Protection Allowance/Monthly Maintenance Allowance Regional Cost of Living) value based on options set on the IM Tax/Assess & Parms page.
Income Protection Allowance	Enter an amount to override the Adjust IPA/MMA Regional COL calculated based on options set on the IM Tax/Assess & Parms page.

Allowances

Tuition	Enter an amount to override the Max Tuition Allowance (maximum tuition allowance) per child on the IM Value Parms 1 page
Medical/Dental	Enter an amount to override the % Unreimbursed Med/Dent Expense (percent unreimbursed medical/dental expense) on the IM Value Parms 1 page.
Employment	Enter an amount to override % Employment Allowance (percent employment allowance) and Max Employment Allowance (maximum employment allowance) on the IM Value Parms 1 page.
Federal Insurance Compensation	Enter an amount to override the allowance calculated by IM.
Income	Enter an amount to override allowance against income calculated by IM.

Overriding INAS Institutional Extension Options 4

Access the INAS Institutional Extension 4 page (click the Extension 4 link on the INAS Institutional Extension 1 page).

INAS Institutional Extension 4		
	STUDENT	PARENT
Local Tax - Percent:	<input type="text"/>	<input type="text"/>
Cap Housing Value:	<input type="text"/>	<input type="text"/>
Home Equity Cap Factor	<input type="text"/>	<input type="text"/>
Asset Assessment Percent:	<input type="text"/>	<input type="text"/>
Local Tax:	<input type="text"/>	<input type="text"/>
Other Asset:	<input type="text"/>	<input type="text"/>
Minimum Asset:	<input type="text"/>	<input type="text"/>
Asset Allowance:	<input type="text"/>	<input type="text"/>
Minimum Income:	<input type="text"/>	<input type="text"/>
Number In College:	<input type="text"/>	<input type="text"/>
Allow Parents In College:		<input type="checkbox"/>

INAS Institutional Extension 4 page

Use the INAS Institutional Extension 4 page to override global policy options.

Local Tax — Percent	Enter an amount to override the amount calculated by IM.
Cap Housing Value	Enter an amount to override the value selected for the Home Cap field on the Home/Asset Projections page.
Home Equity Cap Factor	Enter an amount to override the value selected for the Home Equity Cap Factor field on the Home/Asset Projections page.
Asset Assessment Percent	Enter an amount to override the value selected for the Asset Assessment Rate field on the Home/Asset Projections page.
Local Tax	Enter an amount to override amount calculated by IM.
Other Asset	Enter an amount to add to calculated assets.
Minimum Asset	Enter an amount to override Minimum Contribution from Asset on the IM Value Parns 1 page.
Asset Allowance	Enter an amount to offset discretionary net worth calculated by IM.
Minimum Income	Enter an amount to override the Minimum SC or PC values from the Minimum SC Income and Minimum PC Range pages.
Number in College	Enter a number to override the number of students in college.
Allow Parents in College	Enter an amount to allow parents in college.

Overriding INAS Institutional Extension Options 5

Access the INAS Institutional Extension 5 page (click the Extension 5 link on the INAS Institutional Extension 1 page).

INAS Institutional Extension 5

	STUDENT	PARENT
Institutional		
Percent to Increase Prior Year's Contribution:	<input type="text"/>	<input type="text"/>
Prior Year's Contribution:	<input type="text"/>	<input type="text"/>
Income Assessment Percent:	<input type="text"/>	
Add Percent of IRA/KEOGH:	<input type="text"/>	
Non Custodial Parent Contribution:		<input type="text"/>
Estimated Federal Methodology		
Number In Household:	<input type="text"/>	<input type="text"/>
Number in College:	<input type="text"/>	<input type="text"/>
Allow Parents In College:		<input type="checkbox"/>
Use Projected Year Income:	<input type="checkbox"/>	<input type="checkbox"/>

INAS Institutional Extension 5 page

Use the INAS Institutional Extension 5 page to override INAS global policy options for family factors such as past contributions.

Institutional

Percent to Increase Prior Year's Contribution	Enter an amount to override increase last year SC (or PC) on the IM Value Parms 1 page.
Prior Year's Contribution	Enter the prior year's contribution for use with the Percent to Increase Prior Year's Contribution option.
Income Assessment Percent	Enter an amount to override Use 70% Income Assmnt for Ind or Income Assmnt Rate for Dep from the IM Tax/Assess & Parms page.
Add Percent of IRA/KEOGH	Enter an amount to override the value in the % Of Stdnt IRA Include In NW field from the IM Value Parms 1 page.
Non Custodial Parent Contribution	Enter an amount to override Add Non Cust PC to PC from the IM Yes/No page.

Estimated Federal Methodology

Number In Household Enter an amount to override amount calculated by EFM.

Number In College Enter an amount to override amount calculated by EFM.

Allow Parents In College Enter an amount to override amount calculated by EFM.

**Use Projected Year
Income** Select to override the value entered in the Use Projected Year Income field on the
EFM Yes/No Options page.

Overriding Expected Family Contribution (EFC)

The system displays the override at the parent and student contribution level. Overriding EFC is the same for both FM and IM.

This section discusses how to:

- Access federal EFC overrides.
- Use the federal EFC override function.
- Access institutional EFC overrides.
- Use the institutional EFC override function.

Pages Used to Override and View EFC

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
INAS Federal Extension	INAS_FED_EXTnn_SEC	<p>Click the FM link on the FAFSA Information, Assumptions\School Codes, or EFC\DB Matches\Corr page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records).</p> <p>Click the FM link on the Student Data, Parent Data, Miscellaneous Data, or Computation Data page (Financial Aid, Institutional Application 20nn-20nn, Maintain Application 20nn–20nn).</p> <p>Click the Federal Extension link on the Student Income/Assets, Student Information, Parent Income/Assets, Parent Information, or Overrides page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS).</p>	Override INAS global policy options.
INAS Federal Extension EFC Override	INAS_FEDEX_EFC_SEC	Click the Override Federal EFC link on the INAS Federal Extension page.	Override EFC components for academic and non-standard award periods.
INAS Institutional Extension 1	INAS_PROF_EXT1_Snn	<p>Click the IM link on the FAFSA Information, Assumptions\School Codes, or EFC\DB Matches\Corr page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records).</p> <p>Click the IM link on the Student Data, Parent Data, Miscellaneous Data, or Computation Data page (Financial Aid, Institutional Application 20nn-20nn, Maintain Application 20nn–20nn).</p>	Override INAS global policy options.

Page Name	Definition Name	Navigation	Usage
Institutional EFC Override	INAS_PROF_EFC_SEC	Click the Override Institutional EFC link on the INAS Institutional Extension 1 page.	Override EFC components for academic and non-standard award periods

Accessing Federal EFC Overrides

Access the INAS Federal Extension page (click the FM link on the EFC\DB Matches\Corr page).

INAS Federal Extension

	STUDENT	PARENT
Federal		
INAS Rule Set:	<input type="text" value="CSS Rules"/>	
INAS Calc Type:	<input type="text" value="FM & IM"/>	
INAS Data Source:	<input type="text" value="Both F/I"/>	
Dependency Override:	<input type="text" value="No"/>	
<input type="checkbox"/> Calc a PC for Independent		
Budget Durations		
EFC Proration Options		
Override Federal EFC		
Allowances		
Calculate Federal Tax:	<input type="checkbox"/>	<input type="checkbox"/>
Tuition:	<input type="text"/>	<input type="text"/>
Medical/Dental:	<input type="text"/>	<input type="text"/>
Other:	<input type="text"/>	<input type="text"/>
Asset Allowance:	<input type="text"/>	<input type="text"/>
Assets		
Other:	<input type="text"/>	<input type="text"/>
Assumption Overrides		
Number in College:	<input type="text"/>	
Reject Overrides		
Reject D Override	<input type="text"/>	
Reject E Override	<input type="text"/>	
Reject F Override	<input type="text"/>	
Reject R Override:	<input type="text"/>	
Reject S Override:	<input type="text"/>	
Reject T Override:	<input type="text"/>	

INAS Federal Extension page

Use the Override Federal EFC link on this page to override the academic or non-standard parent contribution or student contribution.

Note. You must select an INAS Rule Set before setting the budget duration and overriding the EFC. When creating an extension record, you must always select an INAS Rule Set. Failing to do so affects your expected results.

Using the Federal EFC Override Function

Access the INAS Federal Extension EFC Override page (click the Override Federal EFC link on the INAS Federal Extension page).

INAS Federal Extension
EFC Override

INAS Rule Set: Undergrad/Graduate ☐ **Use EFC Override Values** **Defaults**

Federal Extension - Override EFC Components

	SC	+	PC	=	EFC
Award Period					
Academic	<input type="text" value="0"/>	+	<input type="text" value="0"/>	=	12,566
Non-Standard	<input type="text" value="0"/>	+	<input type="text" value="0"/>	=	0
Total					
Aid Year	0	+	0	=	12,566

INAS Federal Extension EFC Override page

Enter the actual positive value for the parent contribution and/or student contribution for each award period.

The system displays an override indicator when you override the student contribution, the parent contribution or both. It appears as an O next to the affected contributions.

Use EFC Override Values

Select this check box and call INAS for the system to use your override values. If you want to use actual calculated values, clear the check box and call INAS.

Defaults

Click the Defaults button to reset the student contribution and parent contribution to current values from STD_AWD_PER. If you have already calculated INAS using overridden values, those same values are returned when you click the Defaults button. To retrieve calculated values as the default, clear the Use EFC Override Values check box, call INAS, return to this page, and click the Defaults button.

Note. Ensure that the budget duration set in global policy options or at the extension level supports the EFC overrides being established for the award period. Warning messages appear if you create overrides for an award period that is not supported by the budget duration.

Accessing Institutional EFC Overrides

Access the INAS Institutional Extension 1 page.

INAS Institutional Extension 1

INAS Rule Set: Ugrad/Grad
[Extension 2](#)
[Extension 3](#)
[Extension 4](#)
[Extension 5](#)
Delete

Application Source: Profile
☒ **Alt Min SC from Income Calc**
IGNORE LOSSES

[Budget Durations](#)
☐ **Calc PC For Independent**
☐ **Business/Farm**

[Override Institutional EFC](#)
☐ **Skip Family Member Exclusion**
☐ **Other**

☐ **Work Study Income Exclusion**
☐ **Limit Intl Student's IPA**
☐ **Country Coefficient TCA**

	STUDENT	PARENT
Use Projected Year Income:	<input type="checkbox"/>	<input type="checkbox"/>
Can IM Contribution Fall Below FM:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hope/Lifetime Add Back:	<input type="checkbox"/>	<input type="checkbox"/>
Parent Tax Table - Independent:	<input type="checkbox"/>	
Exclude Tuition/Fee Deduction:		<input type="checkbox"/>

INAS Institutional Extension 1 page

Use the Override Institutional EFC link on this page to override the academic or non-standard parent contribution or student contribution.

Note. You must select an INAS Rule Set before setting the budget duration and overriding the EFC. When creating an extension record, you must always select an INAS Rule Set. Failing to do so affects your expected results.

Using the Institutional EFC Override Function

Access the Institutional EFC Override page (click the Override Institutional EFC link on the INAS Institutional Extension 1 page).

Institutional EFC Override

INAS Rule Set:

CSS Rules

☐ Use EFC Override Values

Defaults

Institutional Extension - Override EFC Components

	SC	+	PC	=	EFC
Award Period					
Academic	<input type="text" value="0"/>	+	<input type="text" value="0"/>	=	0
Non-Standard	<input type="text" value="0"/>	+	<input type="text" value="0"/>	=	0
Total					
Aid Year	0	+	0	=	0

Institutional EFC Override page

Use EFC Override Values

Select this check box and call INAS for the system to use your override values. If you want to use actual calculated values, clear the check box and call INAS.

Using Estimated FM EFC Values

The Financial Aid system stores the estimated FM EFC, which is calculated using institutional application data, for awarding federal funds when only institutional data is available. The system stores and displays the estimated FM EFC only when no ISIR exists for the student. As soon as you load an ISIR for the student and call INAS, the estimated FM EFC is replaced by the EFC from the ISIR.

Note. The system does not consider the status of the ISIR before replacing the estimated FM EFC; it replaces the estimated values with the EFC value from the ISIR after INAS is called.

When in use, the estimated FM EFC populates all FM EFC fields on all pages in the system. The system does not display any visual cue to indicate that the value is an estimate. You need to know whether a student has an ISIR loaded to determine whether the value that appears is an estimated FM EFC or an actual FM EFC.

Using INAS Simulation

The INAS simulation functions as a worksheet for financial aid staff to create different need analysis scenarios before submitting the changes to ISIR Corrections. The INAS Simulation process retrieves information from the ISIR Correction pages and INAS Federal Extension page. You can create or change existing federal extension data or global policy option data in simulation depending on your processing requirements.

This section provides an overview of the steps for INAS simulation and discusses how to:

- Work with student income and assets.
- Override the INAS global policy options at the student level.
- Work with student information.
- Work with parent income and assets.
- Work with parent information.
- Work with assumption overrides.

Understanding the Steps for INAS Simulation

Use the INAS Simulation process to select records with an ISIR to simulate INAS calculations. Then commit changes to ISIR tables when complete.

1. Click the Get Fed Data button on the page you are using.

The latest ISIR information is retrieved and placed in the INAS Simulation tables. You should refresh the INAS Simulation table with the latest data because data from a prior session might remain in the table.

2. Modify fields to affect the INAS calculation, invoke overrides, or both.

You can also override global policy options at the student level, by clicking the Fed Ext button from any page in this component. Unless an extension record already exists in ISIR, the default values that you defined in the INAS Local Global Options page display on the Federal Extension page when you select a Rule Set.

3. When you complete your changes, click the INAS calculate button. The system displays the results of the EFC after a successful completion of INAS simulation.
4. Repeat steps 2 and 3 as needed. To refresh the worksheet, repeat Step 1.
5. Click the Use Simulated Data button to use the calculated data for Need Analysis.

If you confirm that you want to perform the operation, the system inserts a new row in all of the ISIR Tables and any field that was changed is processed as follows:

- a. Sent to the Audit Table for history.
- b. Included in the ISIR Correction process.
- c. Used to recalculate need.

Note. You cannot apply changes to any student whose ISIR is rejected.

Pages Used for INAS Simulation

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Student Income/Assets	INAS_SIM_STU1_nn	Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Income/Assets	View or update fields from ISIR Corrections to perform an INAS calculation.
INAS Simulation Federal Extension	INAS_SIM_FEDEX_Snn	Click the Federal Extension link on the Student Income/Assets page.	Override the INAS global policy options at the student level.
INAS Simulation Budget Durations	INAS_SIMEX_DUR_SEC	Click the Budget Durations link on the INAS Simulation Federal Extension page.	Override INAS global policy options for federal academic and non-standard budget duration.
INAS Simulation EFC Proration Options	INAS_SIMEX_PRO_SEC	Click the EFC Proration Options link on the INAS Simulation Federal Extension page.	Override proration options for academic and non-standard months.
INAS Simulation EFC Override	INAS_SIMEX_EFC_SEC	Click the EFC Override link on the INAS Simulation Federal Extension page.	Override EFC components for academic and non-standard award periods.
Student Information	INAS_SIM_STU2_nn	Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Information	View or update fields from ISIR Corrections to perform an INAS calculation.
Parent Income/Assets	INAS_SIM_PAR1_nn	Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Income/Assets	View or update fields from ISIR Corrections to perform an INAS calculation.
Parent Information	INAS_SIM_PAR2_nn	Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Information	View or update fields from ISIR Corrections to perform an INAS calculation.
Overrides	INAS_SIM_OVRD_nn	Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Overrides	View or update fields from ISIR Corrections to perform an INAS calculation. Set Dependency Override and Correction Status.

Common Page Elements for the INAS Simulation Component

The following elements appear on the Student/Income Assets page, Student Information page, Parent Income/Assets page and Overrides page.

Get Federal Data	Click this button to copy the student's latest ISIR data from the Federal Extension record to this page.
INAS	Click this button to invoke a Remote Function Call of the INAS calculation.
Use Simulated Data	Click this button to move the simulated data into production.
Federal Extension	Click this link to access the INAS Simulation Federal Extension page and make changes to an existing extension or override the INAS Global Policy Options at the student level.
Need Summary	Click this link to view a student's need summary. Need summary information reflects only current values. New data that you have calculated is not reflected on Need Summary pages until you click the Use Simulated Data button, refresh the page and click Get Fed Data again.
Monthly EFC	Click this link to access the INAS Simulation Monthly EFC page to view the INAS calculated monthly EFC for months 1-8 and 10-12.
Formula Type	Displays the formula type used in the INAS calculation. When you click the Get Federal Data button, the system populates the ISIR formula type on record and updates the formula type when INAS is called.
Primary EFC:	Displays the 9-month EFC. When you click the Get Fed Data button, the system populates the ISIR Primary EFC on record and updates the Primary EFC when INAS is called.
Prorated EFC:	Displays the 9-month or other than 9-month EFC. When you click the Get Fed Data button, the system populates the ISIR Prorated EFC on record and updates the Prorated EFC when INAS is called.

Working with Student Income and Assets

Access the Student Income/Assets page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Income/Assets).

Student Income/Assets		Student Information	Parent Income/Assets	Parent Information	Overrides
Chad Harper		ID:		FA0636	
Aid Year: 2010		Financial Aid Year 2009 - 2010		Institution: PSUNV	
Get Federal Data INAS Use Simulated Data		Federal Extension Need Summary Monthly EFC		Formula Type: 4 Simp Dep Primary EFC: 440 Prorated EFC: 440	
Married:	No	AGI:	6,453	Veterans Non-Ed Benefits:	145
Marital Status:	Sng/Div/Wc	U.S. Tax Paid:	560	Other Untaxed Income:	150
Marital Status Date:		Student's Earnings:	6,453	Other Unreported Income:	155
Legal Res State:	OH	Spouse's Earnings:	0		
Legal Res Date:	01/01/1996	Cash:	9,500	Untaxed Income:	1,325
In Family:		Inv Net Worth:	25,700	Educational Credits:	160
In College:		Bus Net Worth:	0	Child Support Paid:	165
Exemptions:	00	Tax Deferred Pension:	110	Need-Based Employment:	170
Res Prior 2004:	No	Self Employment Payment:	115	Grant/Scholarship Aid:	175
File Return?:	Filed/Comp	Child Support Received:	120	Combat Pay:	180
Tax Form:	1040A/EZ/T	Interest Income:	125		
Elig 1040A/EZ?:	Yes	Untaxed IRA Distributions:	130	Add Fin Total:	850
Male or Female:	Female	Untaxed Pensions:	135		
		Military Allowance:	140		

Student Income/Assets page

ISIR edits are not used in the simulation pages. Changes used should not conflict with data in ISIR corrections.

Overriding the INAS global policy Options at the Student Level

Access the INAS Simulation Federal Extension page (click the Federal Extension link on the Student Income/Assets page).

Federal Extension			
Federal	Allowances	STUDENT	PARENT
INAS Rule Set:		<input type="checkbox"/>	<input type="checkbox"/>
INAS Calc Type:			
INAS Data Source:			
Dependency Override:			
<input type="checkbox"/> Calculate PC for Independents			
Budget Durations			
EFC Proration Options			
Override Federal EFC			
	Calculate Federal Tax:		
	Tuition:		
	Medical/Dental:		
	Other:		
	Asset Allowance:		
	Assets		
	Other:		
	Assumption Overrides		
	Number in College:		
	Reject Overrides		
	Reject D Override:		
	Reject E Override:		
	Reject F Override:		
	Reject R Override:		
	Reject S Override:		
	Reject T Override:		

INAS Simulation Federal Extension page

Budget Durations

Click this link to access the INAS Simulation Budget Durations page. You can enter any value for FM budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9-month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period.

EFC Proration Options

Click this link to access the INAS Simulation EFC Proration Options page to determine how to prorate EFC.

Override Federal EFC

Click this link to access the INAS Simulation EFC Override page to override the academic or non-standard parent contribution or student contribution.

Working with Student Information

Access the Student Information page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Information).

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Chad Harper		ID:	FA0636	
Aid Year:	2010	Financial Aid Year	2009 - 2010	
		Institution:	PSUNV	
Get Federal Data INAB Use Simulated Data		Federal Extension Need Summary Monthly EFC		Formula Type: 4 Simp Dep Primary EFC: 440 Prorated EFC: 440
Dependency Status: Dependent w/Primary EFC				
Veterans Benefits:	<input type="checkbox"/>	Born Prior 1986:	<input type="text" value="2"/>	No
Veteran Benefit Type:	<input type="checkbox"/>	Veteran:	<input type="text" value="2"/>	No
Grade Level:	<input type="text" value="1st yr AB"/>	On Active Duty:	<input type="text" value="2"/>	No
Dependents:	<input type="text" value="2"/> No	Graduate Student:	<input type="text" value="2"/> No	
Orphan:	<input type="text" value="2"/> No	Selective Service?:	<input type="checkbox"/>	
Children:	<input type="text" value="2"/> No	1st Degree:	<input type="text" value="2"/> No	
Emancipated Minor:	<input type="text" value="2"/> No	Enroll Status:	<input type="text" value="1"/> Full Time	
Legal Guardianship:	<input type="text" value="2"/> No	Food Stamps:	<input type="text" value="1"/>	Yes
Risk of Homelessness:	<input type="text" value="2"/> No	School Lunch:	<input type="text" value="1"/>	Yes
Dislocated Worker:	<input type="text" value="2"/> No	SSI:	<input type="text" value="1"/>	Yes
		TANF:	<input type="text" value="1"/>	Yes
		WIC:	<input type="text" value="1"/>	Yes
		Work or Loan:	<input type="text" value="3"/>	Both
		Drug Offense:	<input type="text" value="1"/>	Eligible
		Unaccompanied Youth(School):	<input type="text" value="2"/>	No
		Unaccompanied Youth(HUD):	<input type="text" value="2"/>	No

Student Information page

Grade Level

Select from:

1st yr AB (attended before)

1st yr GP (graduate professional)

1st yr NA (never attended)

2nd yr Sph (sophomore)

3rd yr Jnr (junior)

4th yr Snr (senior)

5th yr UG (undergraduate)

Grad/Prof + (graduate/professional beyond 1st year)

Field Name Abbreviations and Explanations

On Active Duty (active duty status for US Armed Forces)

School Lunch (free or reduced price lunch)

SSI (Supplemental Security Income)

TANF (Temporary Assistance for Needy Families)

WIC (Women, Infants and Children)

Unaccompanied Youth(HUD) (Unaccompanied Youth(Housing and Urban Development))

Working with Parent Income and Assets

Access the Parent Income/Assets page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Income/Assets).

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Chad Harper		ID:	FA0636	
Aid Year:	2010	Financial Aid Year 2009 - 2010	Institution:	PSUNV
<input type="button" value="Get Federal Data"/>		Federal Extension		Formula Type: 4 Simp Dep
<input type="button" value="INAS"/>		Need Summary		Primary EFC: 440
<input type="button" value="Use Simulated Data"/>		Monthly EFC		Prorated EFC: 440
Marital Status:	Mar/ReMar	AGI:	48,345	Veterans Non-Ed Benefits: 245
Marital Status Date:		U.S. Tax Paid:	15,678	Other Untaxed Income: 4300
Legal Res State:	OH	Father's Earnings:	15,500	
Legal Res Date:	01/01/1996	Mother's Earnings:	30,000	Untaxed Income: 6,120
In Family:	04	Cash:	55,200	
In College:	1	Inv Net Worth:	140,437	Educational Credits: 136
Exemptions:	04	Bus Net Worth:	230,000	Child Support Paid: 179
Res Prior 2004:	No	Tax Deferred Pension:	210	Need-Based Employment: 140
Tax Form:	1040	Self Employment Payment:	215	Grant/Scholarship Aid: 145
Tax Return Filed?:	Filed/Comp	Child Support Received:	220	Combat Pay: 150
Elig 1040A/EZ?:		Interest Income:	225	
Father Birth Date:	01/01/1954	Untaxed IRA Distributions:	230	Add Fin Total: 750
Mother Birth Date:	01/01/1962	Untaxed Pensions:	235	
		Military Allowance:	240	

Parent Income/Assets page

Working with Parent Information

Access the Parent Information page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Information).

Student Income/Assets	Student Information	Parent Income/Assets	Parent Information	Overrides
Chad Harper		ID:	FA0636	
Aid Year:	2010	Financial Aid Year	2009 - 2010	
		Institution:	PSUNV	
Get Federal Data INAS Use Simulated Data		Federal Extension Need Summary Monthly EFC	Formula Type: Primary EFC: Prorated EFC:	4 Simp Dep 440 440
Dependency Status: Dependent w/Primary EFC				
Food Stamps:	1	Yes		
School Lunch:	1	Yes		
SSI:	1	Yes		
TANF:	1	Yes		
WIC:	1	Yes		
Dislocated Worker:	2	No		

Parent Information page

Field Name Abbreviations and Explanations

School Lunch (free or reduced price lunch)

SSI (Supplemental Security Income)

TANF (Temporary Assistance for Needy Families)

WIC (Women, Infants and Children)

Working with Assumption Overrides

Access the Overrides page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Overrides).

Student Information		Parent Income/Assets		Parent Information		Overrides	
Chad Harper				ID:		FA0636	
Aid Year:		2010		Financial Aid Year 2009 - 2010		Institution: PSUNV	
Get Federal Data		Federal Extension		Formula Type:		4 Simp Dep	
INAS		Need Summary		Primary EFC:		440	
Use Simulated Data		Monthly EFC		Prorated EFC:		440	
STATUS OVERRIDES							
Dependency Override:		<input type="text" value="1"/>		Correction Status:		<input type="text" value="2"/> Send	
ASSUMPTION OVERRIDES							
Parent Number in College:		<input type="text" value="1"/> Yes		Student Number in College:		<input type="text" value="1"/> Yes	
Parent AGI:		<input type="text" value="1"/> Yes		Student AGI:		<input type="text" value="1"/> Yes	
Parent WKC Assumed Zero:		<input type="text" value="1"/> Yes		Student WKC Assumed Zero:		<input type="text" value="1"/> Yes	
REJECT OVERRIDES							
Reject Override A:		<input type="text" value="1"/> Yes		Reject Override K:		<input type="text" value="1"/> Yes	
Reject Override B:		<input type="text" value="1"/> Yes		Reject Override W:		<input type="text" value="1"/> Yes	
Reject Override C:		<input type="text" value="1"/> Yes		Reject Override 3:		<input type="text" value="1"/> Yes	
Reject Override G:		<input type="text" value="1"/> Yes		Reject Override 4:		<input type="text" value="1"/> Yes	
Reject Override N:		<input type="text" value="1"/> Yes		Reject Override 12:		<input type="text" value="1"/> Yes	
Reject Override J:		<input type="text" value="1"/> Yes		Reject Override 20:		<input type="text" value="1"/> Yes	

Overrides page

STATUS OVERRIDES

Dependency Override: Values include:

- 1: Dependent to Independent. You can select this value.
- 2: Cancel Dep Override – Corr Only. You can select this value.
- 3: Override Failed. The correction process sets this value.

Correction Status: Values include:

- 1: Correction(s) Pending. You can select this value.
- 2: Send Correction(s). You can select this value.
- 3: Correction(s) Sent. The correction process sets this value.
- 4: Correction(s) Accepted. The correction process sets this value.
- 5: Corrections Rejected. The correction process sets this value.
- 6: Do Not Send Correction(s). You can select this value.

ASSUMPTION OVERRIDES

Parent Number In College Select *I*:Yes.

Parent AGI (parent adjusted gross income) Select *I*:Yes.

Parent WKC Assumed Zero (parent income from worksheet C assumed 0) Select *I*:Yes.

Student Number In college Select *I*:Yes.

Student AGI (student adjusted gross income) Select *I*:Yes.

Student WKC Assumed Zero (student income from worksheet C assumed 0) Select *I*:Yes.

REJECT OVERRIDES

Select *I*: Yes to override a listed reject.

Using INAS Batch Calculations

This section discusses how to calculate INAS in batch based on the policy options at your institution.

Page Used to Make INAS Batch Calculations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch INAS Calculation	RUNCTL_FAPINCLC	Financial Aid, File Management, INAS Batch Calculation, Batch INAS Calculation	Calculate INAS in batch based on policy options.

Calculating the INAS in Batch

Access the Batch INAS Calculation page (Financial Aid, File Management, INAS Batch Calculation, Batch INAS Calculation).

Batch INAS Calculation

Run Control ID: FMINAS

[Report Manager](#) [Process Monitor](#) Run

Process Name: FAPINCLC

Parameters

Find | View All First 1 of 1 Last

Institution:	PSUNV	PeopleSoft University
Aid Year:	2010	Financial Aid Year 2009 - 2010
Application Type:	B	Both Federal & Profile
Clear Calc Requests?:	N	No

Batch INAS Calculation

The FAPINCLC batch calculation process is the same process as the online calculation. You can run INAS batch calculations automatically after each ISIR data load or as a separate use controlled process. Records loaded into the INAS_CALC_RECS table are selected for processing.

With the delivery of IM each year, the Application Type value is limited to Profile. After FM is delivered, values of Both Federal & Profile and Federal are available as additional processing options.

- Application Type

Select the application type to run INAS batch calculations from these options:
B: Both Federal and Profile
F: Federal
P: Profile
- Clear Calc Requests
(clear calculation requests)

If you select Y, the files are removed from the table after the batch calculation. You cannot run batch INAS on these files again unless they are added to INAS_CALC_RECS by loading new ISIR files with the appropriate data load parameters, or by using population update.

Viewing Federal EFC Information

This section discusses how to review Federal EFC summary information.

Pages Used to Review Federal EFC Information

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Page Name	Definition Name	Navigation	Usage
Federal EFC Summary	ISIR_FM_SUMRY_nn	Financial Aid, Federal Application Data, View 20nn-20nn FM EFC Detail, Federal EFC Summary	Review information about a student's federal EFC (expected family contribution).
ISIR Information	ISIR_INFO_SMRY_SEC	Click the ISIR Information Summary link on the Federal EFC Summary inquiry page.	View ISIR summary information for this student.
Assumption Detail	STDNT_FM_ASMP_SEC	Click the Assumption Detail link on the Federal EFC Summary inquiry page.	View a long description of any assumption the system is using in the INAS calculation.
Total Income Detail	ISIR_TI_SEC	Click the Total Income Detail link on the Federal EFC Summary inquiry page.	View total income information. Total income is the difference between taxable income, untaxed income, and adjustments to income.
Total Allowances Detail	ISIR_TA_SEC	Click the Total Allowances Detail link on the Federal EFC Summary inquiry page.	View allowances to income. Taxes paid, Income Protection and Employment allowances are displayed.
Available Income Detail	ISIR_AI_SEC	Click the Available Income Detail link on the Federal EFC Summary inquiry page.	View available income information for the student. Available income is total income less total allowances.
Total Parent Contribution Detail	ISIR_PC_SEC_nn	Click the Total Parent Contribution Detail link on the Federal EFC Summary inquiry page.	View total parent contribution information for this student, including Available Income, Contribution from Assets, Adjustments to Available Income, the Total Parent Contribution, Number in College, and Calculated Parent Contribution. This page is available only if the student is a dependent and provides parent income and asset information.

Page Name	Definition Name	Navigation	Usage
Total Student Contribution Detail	ISIR_SC_SEC_nn	Click the Total Student Contribution Detail link on the Federal EFC Summary inquiry page.	View total student contribution. This page displays the Total Student Contribution, Number in College, Student Income Contribution, Student Asset Contribution, and Calculated Student Contribution.
Prorated EFC Detail	ISIR_EFC_SEC_nn	Click the Prorated EFC Detail link on the Federal EFC Summary inquiry page.	View information about the prorated EFC for the student. The page displays Parent Contribution (if applicable), Student Income Contribution, Student Asset Contribution, the Prorated EFC, and the Calculated EFC. The prorated EFC reflects enrollment for 9 months or other than 9 months depending on the budget duration.

Reviewing Federal EFC Summary Information

Access the Federal EFC Summary page (Financial Aid, Federal Application Data, View 20nn-20nn FM EFC Detail, Federal EFC Summary).

Federal EFC Summary

Johana Sandoval

ID: FA0632

Aid Year: 2009 Financial Aid Year 2008 - 2009

Institution: PSUNV

[Find](#) | [View All](#) First 1 of 3 Last

Eff Date: 12/12/2007 **Transaction Nbr:** 1 **EFC Status:** Unofficial [ISIR Information Summary](#)

Federal Needs Analysis Dependent w/Primary EFC

Total Income:	41,573	Detail	Assumption Detail
Total Allowances:	27,443	Detail	
Available Income:	14,130	Detail	
Total Parent Contribution:	12,839	Detail	
Total Student Contribution:	983	Detail	
Prorated EFC:	13,822	Detail	
Primary EFC:	13,822		

Federal EFC Summary page

From this page, select links to all detail pages for the students' EFC for a specified aid year. The system supports three active aid years.

For Total Student Contribution, N/A is displayed to more closely align interim calculation results with Software Developer Specifications for Independent Students without Dependents (formula 2 and 5 students).

Viewing Institutional EFC Information

This section provides an overview of institutional EFC calculations and discusses how to review an institutional EFC summary.

Understanding Institutional EFC Calculations

The following methodologies are used to calculate both parent and student contributions shown on the Institutional EFC Summary page:

- Estimated federal methodology (EFM) uses the federal methodology provided by the College Board to calculate an estimated federal contribution.
- Base Institutional Methodology (IM) uses the institutional methodology provided by the College Board.
- IM with Options uses the IM provided by the College Board and can reflect override options that you set up.

Student contributions are also calculated by IM Estimated, which uses the IM estimated summer and academic year data. All computations are nine-month calculations, regardless of the student's dependency status.

Pages Used to View Institutional EFC

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Institutional EFC Summary	INST_INAS_SMRY_nn	Financial Aid, Institutional Application Data, View 20nn-20nn IM EFC Detail, Institutional EFC Summary	Review information about a student's Institutional EFC (expected family contribution). From this page, access detailed information for each calculated amount.
Institutional Assumption Detail	STDNT_IM_ASMP_SEC	Click the IM Assumptions link on the Institutional EFC Summary Detail page.	View the institutional assumptions that apply to a student. INAS IM Assumption Codes are defined by the College Board and are delivered with the Financial Aid system. An assumption is an assumed response to a question that is left blank or to a response that was inconsistent with the guidelines.
Total Income Detail Parent Contribution IM and IM w/ Options	INST_PIM_TI_SEC_nn, INST_PIM_TIO_SECnn	Click the Total Income Detail link on the Institutional EFC Summary Detail page.	View total income information for parents calculated using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income and adjustments to income on earned income.
Total Income Detail Parent Contribution - EFM	INST_PFM_TI_SEC_nn	Click the Total Income Detail link on the Institutional EFC Summary Detail page.	View total income information for parents using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.

Page Name	Definition Name	Navigation	Usage
Total Income Detail Student Contribution - IM, IM w/Options, IM Estimated	INST_SIM_TI_SEC_nn, INST_SIM_TIO_SECnn, INST_SIM_TIE_SECnn	Click the Total Income Detail link on the Institutional EFC Summary Detail page.	View total income information for the student using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.
Total Income Detail Student Contribution – EFM	INST_SFM_TI_SEC_nn	Click the Total Income Detail link on the Institutional EFC Summary Detail page.	View total income information for the student using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.
Available Income Detail Parent Contribution – IM, IM w/Options	INST_PIM_AI_SEC_nn, INST_PIM_AIO_nn	Click the Available Income Detail link on the Institutional EFC Summary Detail page.	View information about parents' contribution using institutional methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). Total Allowances is the sum of these allowances. Available Income is the Total Income, shown on the Total Income page, less the Total Allowances.
Available Income Detail Parent Contribution - EFM	INST_PFM_AI_SEC_nn	Click the Available Income Detail link on the Institutional EFC Summary Detail page.	View information about parent's contribution using estimated federal methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). Total Allowances is the sum of these allowances. Available Income is the Total Income, shown on the Total Income page, less the Total Allowances.

Page Name	Definition Name	Navigation	Usage
Available Income Detail Student Contribution – IM, IM w/Options, IM Estimated	INST_SIM_AI_SEC_nn, INST_SIM_AIO_SECnn, INST_SIM_AIE_SECnn	Click the Available Income Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using your institutional methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance/monthly maintenance allowance (IPA/MMA). Total Allowances is the sum of these allowances. Available Income is the Total Income, shown on the Total Income page, less the Total Allowances.
Available Income Detail Student EFM	INST_SFM_AI_SEC_nn	Click the Available Income Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using estimated federal methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). Total Allowances is the sum of these allowances. Available Income is the Total Income, shown on the Total Income page, less the Total Allowances.
Net Worth Detail Parent Contribution IM, IM w/Options	INST_PIM_NW_SECnn, INST_PIM_NWO_SEC_nn	Click the Net Worth Detail link for Parent Contribution, on the Institutional EFC Summary Detail page.	View detail information about the parents' net worth, the total assets calculated by IM.
Net Worth Detail Parent Contribution – EFM	INST_PFM_NW_SEC_nn	Click the Net Worth Detail link for Parent Contribution, on the Institutional EFC Summary Detail page.	View detail information about parent's net worth, the total assets calculated by EFM.
Net Worth Detail Student Contribution - IM, IM w/Options, IM Estimated	INST_SIM_NW_SEC_nn, INST_SIM_NWO_SECnn, INST_SIM_NWE_SECnn	Click the Net Worth Detail link for Student Contribution, on the Institutional EFC Summary Detail page.	View detail information about student's net worth, the total assets calculated by IM.
Net Worth Student Contribution – EFM	INST_SFM_NW_SEC_nn	Click the Net Worth Detail link on the Institutional EFC Summary Detail page.	View information about student's net worth, the total assets calculated by EFM.

Page Name	Definition Name	Navigation	Usage
Discretionary Net Worth Income Supplement Detail Parent Contribution - IM, IM w/Options	INST_PIM_DN_SEC_nn, INST_PIM_DNO_SECnn	Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the parent using institutional methodology.
Discretionary Net Worth Income Supplement Detail Parent Contribution – EFM	INST_PFM_IS_SEC_nn	Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the parent using estimated federal methodology.
Discretionary Net Worth Income Supplement Detail Student Contribution – IM, IM w/Options, IM Estimated	INST_SIM_DN_SEC_nn, INST_SIM_DNO_SECnn, INST_SIM_DNE_SECnn	Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the student using institutional methodology.
Discretionary Net Worth Income Supplement Detail Student Contribution – EFM	INST_SFM_IS_SEC_nn	Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.	View information on calculated allowances to offset net worth for the student using estimated federal methodology.
Contribution for Student Detail Parent Contribution – IM, IM w/Options	INST_PIM_TC_SEC_nn, INST_PIM_TCO_SECnn	Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.	View information about the parent contribution for the student using institutional methodology.
Contribution for Student Detail Parent Contribution – EFM	INST_PFM_TC_SEC_nn	Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.	View information about the parent contribution for the student using federal methodology.
Contribution for Student Detail Student Contribution – IM, IM w/Options, IM Estimated	INST_SIM_TC_SEC_nn, INST_SIM_TCO_SECnn, INST_SIM_TCE_SECnn	Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using institutional methodology.
Contribution for Student Detail Student Contribution – EFM	INST_SFM_TC_SEC_nn	Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.	View information about student contribution using estimated federal methodology.

Reviewing an Institutional EFC Summary

Access the Institutional EFC Summary page (Financial Aid, Institutional Application Data, View 20nn-20nn IM EFC Detail, Institutional EFC Summary).

Institutional EFC Summary					
Reeves,Douglas G		ID: FA1023			
Aid Year: 2011	Source: Profile	Institution: PSUNV		IM Assumptions	
Dependent w/Primary EFC	PARENT CONTRIBUTION		STUDENT CONTRIBUTION		
	Base IM <input type="button" value="v"/>	EFM	Base IM <input type="button" value="v"/>	EFM	
	Total Income:	119,049 Detail	117,249 Detail	0 Detail	0 Detail
	Available Income:	35,958 Detail	45,148 Detail	0 Detail	-9,999,999 Detail
	Net Worth:	29,571 Detail	3,800 Detail	100 Detail	100 Detail
	DNW/Inc Supp:	0 Detail	0 Detail	100 Detail	20 Detail
	Contrib for Student:	5,921 Detail	5,335 Detail	1,175 Detail	35 Detail

Institutional EFC Summary page

The system displays the Total Income, Available Income, Net Worth, DNW/Inc Supp (Discretionary Net Worth/Income Supplement), and Contribution for Student for both parent and student contribution for the selected student, application source, and aid year.

Click the IM Assumptions link to access the Institutional Assumption Detail page, which describes any INAS assumptions that apply to the student.

Click the Detail links to access detailed information for each displayed amount.

See [Chapter 24, "Processing INAS," Reviewing INAS Assumption Codes, page 775.](#)

Parent Contribution

EFM totals are always displayed. Select either basic IM or IM with options.

Base IM Uses the institutional methodology provided by the College Board.

IM w/Options Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.

EFM (estimated federal methodology) Uses the federal methodology formula provided by the College Board to calculate an estimated federal parent contribution.

Student Contribution

EFM totals are always displayed. Select Base IM, IM Estimated, or IM with Options.

Base IM Uses the institutional methodology provided by the College Board.

IM Estimated	Uses the institutional methodology estimated summer and academic year data. All computations in this section are nine-month calculations.
IM w/Options	Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.
EFM (estimated federal methodology)	Uses the federal methodology formula provided by the College Board to calculate an estimated federal student contribution.

Reviewing Need Summary

This section discusses how to view need summary information.

Pages to View Need Summary

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Need Summary	NEED_SUMMARY_SEC	Click the Need Summary link on the FAFSA Information page.	View the award period and EFC status for both the Federal and Institutional cost of attendance, expected family contribution, need, GI bill, total aid, unmet need, and aid overaward.

Viewing Need Summary Information

Access the Need Summary page (click the Need Summary link on the FAFSA Information page).

Need Summary			
Find View All First 1 of 2 Last			
Award Period: Academic		EFC Status: Official	
Federal		Institutional	
COA:	22,700.00	COA:	22,700.00
EFC:	8,515 9 Mo.	EFC:	0 0.0 Mo.
Need:	14,185.00	Need:	0.00
Montgomery GI Bill/Americorps:	0	Montgomery GI Bill/Americorps:	0
Total Aid (Fed):	6,625.00	Total Aid (Inst):	6,625.00
Unmet Need (Fed):	7,560.00	Unmet Need (Inst):	0.00
Overaward (Fed):	0.00	Overaward (Inst):	0.00
Federal Calc Information		Institutional Calc Information	
Federal Rule Set: Ugrad/Grad		Institutional Rule Set:	
		Institutional EFC Used:	

Need Summary page

Reviewing INAS Assumption Codes

To set up INAS Assumptions Codes, use the INAS Assumption Codes component (INAS_ASMPTN_CODES).

This section discusses how to:

- Review INAS FM assumption codes.
- Review INAS IM assumption codes.

Pages Used to Review INAS Assumption Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
INAS FM Assumption Codes	INAS_FM_ASMPTN	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS FM Assumption Codes	Review assumption codes regarding federal application information. INAS FM assumption codes are provided by the College Board and are based on CPS (central processing system) and delivered with the Financial Aid system.
INAS IM Assumption Codes	INAS_IM_ASMPTN	Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS IM Assumption Codes	Review assumption codes regarding institutional application information. INAS IM assumption codes are provided by the College Board and are delivered with the Financial Aid system.

Reviewing INAS FM Assumption Codes

Access the INAS FM Assumption Codes page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS FM Assumption Codes).

INAS FM Assumption Codes

INAS IM Assumption Codes

Aid Year: 2010

Financial Aid Year 2009 - 2010

FM Assumptions

Find

1-74 of 74

Code	Long Description		
70	Assumption PG suppressed.		+ -
71	Assumption PI suppressed.		+ -
72	Assumption PV suppressed.		+ -
73	Assumption SM suppressed.		+ -
74	Assumption SQ suppressed.		+ -
75	Assumption S5 suppressed.		+ -
76	Assumption X2 suppressed.		+ -

NAS FM Assumption Codes page

Use this page to review the FM assumption code defined by INAS for the aid year.

With the delivery of IM each year, the IM Assumption Code values are available. After FM is delivered, the FM Assumption Code values are available.

Reviewing INAS IM Assumption Codes

Access the INAS IM Assumption Codes page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS IM Assumption Codes).

INAS EM Assumption Codes

INAS IM Assumption Codes

Aid Year: 2011

Financial Aid Year 2010 - 2011

IM Assumptions

1-191 of 191

Code	Long Description	
P0	Parents' EFM number in college overridden by local policy option	<div>+ -</div>
P03B	Parents assumed to be married	<div>+ -</div>
P03C	Parents assumed to be married	<div>+ -</div>
P03D	Parents assumed to be unmarried	<div>+ -</div>
P04B	Parents' reported household size overridden by family matrix	<div>+ -</div>
P04C	Parents' reported household size overridden by family matrix	<div>+ -</div>
P05B	Parents' total number in college assumed from family matrix	<div>+ -</div>

INAS IM Assumption Codes page

Use this page to review the IM assumption code defined by INAS for the aid year.

Chapter 25

Assessing Eligibility for Financial Aid

To assess a student's eligibility for financial aid and determine how much aid is reasonable, the institution must verify the accuracy of the information in the student's application. This chapter discusses how to:

- Set up verification options.
- Verify resource and household information.
- Work with auto verification.
- Use batch verification.
- Use National Student Loan Data System (NSLDS) data and processes.
- View application history.

See Also

Chapter 24, "Processing INAS," Using INAS Simulation, page 754

Chapter 24, "Processing INAS," Using INAS Batch Calculations, page 764

Setting Up Verification Options

Verification is the process of checking the accuracy of the information provided by students and their families when applying for financial aid. Institutions are required to perform federal verification on a portion of their aid applicants before awarding Title IV aid. The Campus Solutions application provides options for meeting federal and institutional verification requirements.

This section discusses how to set up tolerances.

See Also

U.S. Dept. of Education's Federal Student Aid Handbook

Page Used to Set Up Verification Options

Page Name	Definition Name	Navigation	Usage
Verification Tolerance	VERIF_FLD_TOLS	Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Tolerance Setup, Verification Tolerance	Activate fields for federal and institutional processing and filter for use by dependency status.

Setting Up Tolerances

Access the Verification Tolerance page (Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Tolerance Setup, Verification Tolerance).

Verification Tolerance

Academic Institution: PSUNV PeopleSoft University
 Aid Year: 2010 2009-2010

Find First 1 of 1 Last

Effective Date: 01/01/1900
 Status: Active

Total Tolerance Federal: 400
 Total Tolerance Institutional: 400

Field Tolerance
 Customize | Find | View All | First 1-10 of 71 Last

Use Federal Verification Institutional Verification

*Field Number	Field Name	Federal	Institutional		
1	Students Number in College	✓	✓	+	-
2	Parents Number in College	✓	✓	+	-
3	Students Family Size	✓	✓	+	-
4	Parents Family Size	✓	✓	+	-
5	Students Number of Exemptions	✓	✓	+	-
6	Parents Number of Exemptions	✓	✓	+	-
7	Students Marital Status	✓	✓	+	-
8	Parents Marital Status	✓	✓	+	-
9	Students Tax Form Used	✓	✓	+	-
10	Parents Tax Form Used	✓	✓	+	-

Verification Tolerance page: Use tab

Three tabs are available: Use, Federal Verification, and Institutional Verification.

To set up the verification tolerances for your institution, copy and edit the delivered data to meet the needs of your institution.

The following fields are common to all three tabs: Use, Federal Verification, and Institutional Verification.

Effective Date	Displays the effective date for these verification tolerance rules. The effective date defines when the status that you select is valid.
Status	Displays the status for the data. Values are <i>Active</i> and <i>Inactive</i> .
Total Tolerance Federal	Enter the total level accepted for federal requirements. This tolerance is the maximum difference that can exist between a student's reported and verified information to still pass federal requirements. You can also assign a tolerance for each field based on the need of your institution.
Total Tolerance Institutional	Enter the total level accepted for institutional requirements. This tolerance is the maximum difference that can exist between a student's reported and verified information to still meet your institutional requirements. You can also assign a tolerance for each field based on the need of your institution.
Field Number	Enter the field number for each of the fields to verify.
Field Name	Displays the corresponding name for each field to verify.
Federal	Select to use this field in federal compare process for tolerance acceptance.
Institutional	Select to use this field in institutional compare process for tolerance acceptance.

Select the Federal Verification tab.

Verification Tolerance

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2010 2009-2010

Find First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

Total Tolerance Federal: 400 **Total Tolerance Institutional:** 400

Field Tolerance

Customize | Find | View All | First 1-10 of 71 Last

Use Federal Verification Institutional Verification

Field Number	Field Name	Dependent	Independent	Tolerance Type	Tolerance Amount	Percent Tolerance
1	Students Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
2	Parents Number in College	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
3	Students Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
4	Parents Family Size	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
5	Students Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
6	Parents Number of Exemptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
7	Students Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
8	Parents Marital Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
9	Students Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
10	Parents Tax Form Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		

Verification Tolerance page: Federal Verification tab

- Dependent** Select to compare the field for dependent students.
- Independent** Select to compare the field for independent students.
- Tolerance Type** Select the tolerance type to use for federal verification. Values are *Use Amount* or *Use Pct* (use percentage).
- Tolerance Amount** Enter the maximum amount by which the source and target can differ when federal fields are compared.
- Percent Tolerance** Enter the maximum percentage by which the source and target can differ when federal fields are compared.

Select the Institutional Verification tab.

Verification Tolerance

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2010 2009-2010

Find First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

Total Tolerance Federal: 400 **Total Tolerance Institutional:** 400

Field Tolerance

Customize Find View All First 1-10 of 71 Last

Use Federal Verification Institutional Verification

Field Number	Field Name	Dependent	Independent	Tolerance Type	Tolerance Amount	Percent Tolerance
1	Students Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
2	Parents Number in College	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
3	Students Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
4	Parents Family Size	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
5	Students Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
6	Parents Number of Exemptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
7	Students Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
8	Parents Marital Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		
9	Students Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		
10	Parents Tax Form Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		

Verification Tolerance page: Institutional Verification tab

Dependent	Select to compare the field for dependent students.
Independent	Select to compare the field for independent students.
Tolerance Type	Select the tolerance type to use for institutional verification. Select either <i>Use Amount</i> or <i>Use Pct</i> (use percentage).
Tolerance Amount	Enter the maximum amount by which the source and target can differ when institutional fields are compared.
Percent Tolerance	Enter the maximum percentage by which the source and target can differ when institutional fields are compared.

Verifying Resource and Household Information

Use the pages in the Application Data Verification component to verify the number of persons in the household, the number enrolled in post-secondary education, the AGI, income tax paid for the base year, and certain untaxed income and benefits for the base year.

This section provides an overview of calculating Federal Variance and discusses how to:

- Verify household information.
- Verify tax data.
- Verify W-2 information.
- Verify federal untaxed income.
- Verify federal additional financial information.
- Verify institutional untaxed income.
- Verify institutional other taxable income.
- Consolidate forms.

Note. The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Understanding Federal Variance Calculation

Federal Variance (FED Variance) calculation compares the Source data (AGI + Untaxed Income – US Tax Paid) and the Target data (AGI + Untaxed Income – US Tax Paid) and displays the difference. All Federal or Institutional Untax Income is included as Untax Income when FED Variance is calculated.

The FED variance calculation is used in conjunction with the Total Tolerance Federal or Institutional field value in Verification Tolerance setup to determine if a student passes or fails.

Pages Used to Verify Resource and Household Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Household Info	VERIF02_FORM1	Financial Aid, Verification, Manage 20nn-20nn Verification, Household Info	Enter documented information about the student and members of the student's household.
TIV School Information	VERIF_SCHL_CD_SEC	Click the TIV Information link on the Household Info page. This link appears when you enter a valid school code.	View Title IV school information.
Get Institutional Data	VERIF_APP_SRC_CODE	Click the Get Inst Data button on the Household Info page.	Indicate which Application Source code to use to populate fields with institutional data.

Page Name	Definition Name	Navigation	Usage
Tax Form Data	VERIF04_FORM2	Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Form Data	Enter information reported on the filer's tax form.
Student's Income from Wages	VERIF_WAGES_STDNT	Click the Student/Spouse Wages link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Parent Income from Wages	VERIF_WAGES_PARENT	Click the Parent's Wages link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Other Taxable Income	SFA_OTHER_INC1_05, SFA_OTHER_INC2_05, SFA_OTHER_INC3_10	Click the Other Taxable Income link on the Tax Form Data page.	Enter 1040, 1040A or 1040EZ taxable income line items other than wages.
Schedule 1	VERIF01_SCH1_SEC	Click the Sch 1 link on the Other Taxable Income page.	Enter or view detail information on 1040A interest and dividend income. Entries here write to Interest Income and Dividend Income.
Schedule B	SCHB99_SEC	Click the Sch B link on the Other Taxable Income page.	Enter or view detail information about 1040 interest and dividend income. Entries here write to Interest Income and Dividend Income. Foreign Accounts/Trusts detail is also recorded here.
Schedule C	SCH_C_SEC	Click the Sch C link on the Other Taxable Income page.	Enter or view data about profit or loss from a business. Entries made here write to the Other Taxable Income - Business Income/Loss field.
Schedule D	SFA_SCH_D1_SEC05	Click the Sch D link on the Other Taxable Income page.	Enter or view information about short-term capital gains and losses, long-term capital gains and losses, and summary and tax computation. Entries made here write to the Other Taxable Income - Capital Gains/Loss field.

Page Name	Definition Name	Navigation	Usage
Schedule E	SCH_E_SEC	Click the Sch E link on the Other Taxable Income page.	Enter or view supplemental income and loss. Entries made here write to the Other Taxable Income - Rental Income, Trusts page.
Schedule F	SCH_F_P1_SEC	Click the Sch F link on the Other Taxable Income page.	Enter or view farm income cash or accrual method or expense information. Selecting cash or accrual affects additional fields that the system activates. Accrual activates accrual and expense fields. Cash activates accrual fields only. Entries made here write to the Other Taxable Income - Farm Income/Losses page.
Income Adjustments	SFA_INCOME_ADJ_09	Click the Income Adjustments link on the Tax Form Data page.	Record 1040 or 1040A adjustments to income. The tax form recorded as filed determines which fields activate. Values entered here write to Tax Form Data/Income Adjustments and may affect Federal and Institutional specific verification pages.
Tax, Credits and Payments	SFA_TAXCREDIT_10, SFA_TAXCREDIT_A10, SFA_TAXCREDIT_EZ08	Click the Tax, Credits, and Payments link on the Tax Form Data page.	Enter or view tax and credit data. The filed tax form determines which fields are active. With the exception of Earned Income Credit and Additional Child Tax Credit, credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data - US Income Tax Paid field.
Schedule A Itemize Deductions	SCHA_1_14_SEC_09	Click the Sch A link on the Tax and Credits page from the Tax Form Data page.	Enter or view allowable itemized deductions. Values entered here affect the total written to the taxable income on the Tax and Credits page.
W-2 Form	VERIF03_FORM3	Financial Aid, Verification, Manage 20nn-20nn Verification, W-2 Form	Enter or view information reported on a person's W-2 form.

Page Name	Definition Name	Navigation	Usage
Verification W2 - Box 12	VERIF03_W2_BOX12	Click the Box 12 link on the W-2 Form page.	Enter or view information from Box 12 on the W-2 form.
Fed Untax Income	SFA_FED_UNTAX_INC	Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Untax Income	Enter or view federal untaxed income data. Displays only field values that originate from Total Other Income or Income Adjustment pages. The family member row determines which fields are active.
Fed Add Fin Info	SFA_FED_ADD_FIN_IN	Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Add Fin Info	Enter or view federal additional financial information. Display only field values originate from U.S. Income Tax Paid page.
Inst Untax Income	SFA_INST_UNTAX_INC	Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Untax Income	Enter or view Institutional untaxed income data. Display only field values originate from Untaxed Income or Income Adjustment pages. The family member row determines which fields are active.
Inst Other Taxable	SFA_INST_OTHER_TAX	Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Other Taxable	Enter or view institutional other taxable income. Display only field values originate from Total Other Income page. The family member row determines which fields are active.
Tax Data Consolidation	VERIF_TAX_CONSL_03	Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Data Consolidation	Combine the income and resources of all family members of the individual being verified.
Consolidated Tax Data	VERIF04_CONSL_SEC	Click the Consolidated Tax Data link on the Tax Data Consolidation page.	View or edit consolidated tax and resource information.

Verifying Household Information

Access the Household Info page (Financial Aid, Verification, Manage 20nn-20nn Verification, Household Info).

Household Info

Tax Form Data

W-2 Form

Fed Untax Income

Fed Add Fin Info

Inst Untax Income

Crossman,Margaret L

ID: FA0607

Aid Year: 2010 Financial Aid Year 2009 - 2010

Institution: PSUNV

National ID: 292-50-8368

Date of Birth: 07/15/1987

Get Fed Data

Get Inst Data

Application Data Verification

Find | View All

First 1 of 1 Last

Sequence: 1 ☒ Student ☐ Spouse ☐ Father ☐ Mother ☐ Other/Step

Number in Family: ☐ Override Family Members

Number in College: ☐ Override Number in College

Household Information

Customize | Find | View All

First 1 of 1 Last

Member Nbr	Relationship	Member Name	Age	School Code
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Household Info page

Note. This page is the first of eight pages in this component (use the arrow on the right to scroll to the hidden pages). After you click on either the Get Fed Data button or the Get Inst Data button, only the relevant pages display.

The system displays the student information, including National ID. For students in the United States, the National ID is the Social Security number (SSN).

The page maintains a separate row for each household member. Ensure that you are accessing the correct row for the person you are verifying.

- Get Fed Data** (get federal data)

Click this button to populate fields with the most recent Institutional Student Information Record (ISIR) record data. When federal data is retrieved, the Inst Untax Income page and Inst Other Taxable page are hidden.
- Get Inst Data** (get institutional data)

Click this button to populate fields with institutional record data. The system prompts you to enter an application source code. When institutional data is retrieved, the Fed Untax Income page and Fed Add Fin Info page are hidden.

Note. You should use the Get Fed Data/Get Inst Data functionality. Not doing so might cause unintended results.

Application Data Verification

- Sequence

Sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified.
- Number in Family

Enter the number in the student's family.

Override Family Members	Select to override the number of family members used to calculate the expected family contribution (EFC).
Number in College	Enter the number of the student's family members in college.
Override Number in College	Select to override the number of family members in college used to calculate the EFC.

Household Information

Member Nbr (member number)	Displays the household member counter. The system increases this field by one for each row inserted at the household member level.
Relationship	<p>Select the relationship to the student of the person selected in Sequence. For example, the sequence for an independent student might be, self, spouse, son. Data verification for the parent of a dependent student might be self (father), spouse, son (student applicant), daughter. You would not complete the family grid or enter number in family or college values for a dependent student row.</p> <p>All dependent students must be listed as a relation with only one father, mother, or other/step category to be counted in the parent household. Recording the student in more than one of these categories results in overcounting.</p> <p>Members listed for student and spouse household categories are compared to household size and the value for number in college for the student. Members listed for father, mother, and other/step are compared to household size and the value for the number in college for parent (dependent students are always included in the parent household in an aid application).</p>
School Code	Enter a valid school code, if applicable. Entering a valid school code enables the system to calculate a value for the Number In College field. If the school code remains blank, the system does not calculate the number in college. A TIV Information link becomes available when you enter a valid college code. It displays demographic information for the school.
TIV Information	This link only appears when a valid School Code is selected. Click the link to open the TIV School Information page.

Viewing TIV School Information

Access the TIV School Information page (click the TIV Information link on the Household Info page).

TIV School Information

School Code:	001003	Aid Year:	2009-2010	<input type="checkbox"/> TIV Inst Code DL Participant
Description	FAULKNER UNIVERSITY			
Address:	5345 ATLANTA HIGHWAY			
City:	MONTGOMERY			
State:	AL	Country:	USA	
Postal:	36109			

TIV School Information page

Getting Institutional Data

Access the Get Institutional Data using page (click the Get Inst Data button on the Household Info page).

Get Institutional Data using

Application Source Code:

Profile

Get Institutional Data using page

- Application Source Code**
- Select from these values:
- FT Canada Student Loan* (full-time Canadian student loan)
- Institutional Application*
- Need Access*(for 2010 and prior Aid Years only)
- Profile*
- PT Canada Student Loan* (part-time Canadian student loan)

Verifying Tax Data

Access the Tax Form Data page (Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Form Data).

Household Info	Tax Form Data	W-2 Form	Fed Untax Income	Fed Add Fin Info	Tax Data Consolidation
Contreras,Victoria R		ID: FA0613			
Aid Year: 2010		Institution: PSUNV			
Find View All First 1 of 2 Last					
<input checked="" type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Father <input type="radio"/> Mother <input type="radio"/> Other/Step Sequence: 1					
Filing Information					
Tax Return Filed?		Filed/Comp		Wages: 5,434 Student/Spouse Wages	
Tax Form:		1040		Total Other Income: 20 Other Taxable Income	
Eligible For 1040A or 1040EZ?		Yes		Income Adjustments: 50 Income Adjustments	
Marital Status:		Sng/Div/Wd		Adjusted Gross Income: 5,404	
Filing Status:		Single		U.S. Income Tax Paid: 345 Tax, Credits, and Payments	
Dependents:		No		Untaxed Income: 684	
Number of exemptions:				<input type="checkbox"/> Special Circumstances	

Tax Form Data page

Note. This page is for a federal dependent student. Therefore the Inst Untax Income and Inst Other Taxable pages are not available.

Sequence Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. The selected button indicates the person whose information is being verified.

Filing Information

Tax Return Filed Select from these values:

Filed/Comp: A completed return is filed.

Not Filed: A return is not filed.

Will File: A return is not yet filed but will be filed.

None: No information is available about the return.

Tax Form Select the type of tax form filed by the person whose information is being verified. The value that you select determines which fields are activated on the Tax Form Data, Other Taxable Income, Income Adjustments and Tax, Credits and Payments pages. Select from: *1040, 1040A, 1040EZ, Canadian, Foreign, Puerto Rico, and Territory.*

Eligible For 1040A or 1040EZ (eligible to file 1040A or 1040EZ) Select whether the filer is eligible to file the tax form 1040A or 1040EZ.

Marital Status Select the marital status of the person whose documents are being verified.

Filing Status	Select the tax filing status of the person whose information is being verified. The value that you select determines which fields the system activates in the Wages page. Select from the following values: <i>Head HH</i> (head of household), <i>Joint</i> , <i>Separate</i> , <i>Single</i> , and <i>Widower</i> .
Dependents	Select <i>Yes</i> if the person whose information is being verified has dependents and select <i>No</i> if not.
Number of exemptions	Enter the number of exemptions for the person whose information is being verified.
Wages	Enter the amount of wages for the person whose information is being verified.
Total Other Income	Enter any taxable income besides wages reported by the person whose information is being verified.
Income Adjustments	Enter any allowable adjustments to income as reported by the person whose information is being verified.
Adjusted Gross Income	Enter the total of wages and other income less income adjustments for the person whose information is being verified.
U.S. Income Tax Paid	Enter the total of U.S. income tax paid by the person whose information is being verified.
Untaxed Income	Enter the amount of untaxed income for the person whose information is being verified.
Special Circumstances	Select this check box to update the Special Circumstance check box on the Miscellaneous Data page in the Maintain Institutional Application component. Use this check box when an institutional applicant has attached a note or letter to the documentation submitted describing special circumstances to be considered.

Note. You can enter data in the Total, Other Income, Income Adjustments, U.S. Income Tax Paid, and Untaxed Income fields to override information on the associated detail pages. However, overriding information is not recommended.

Entering Student Income from Wages

Access the Student's Income from Wages page (click the Wages link on the Tax Form Data page).

Student's Income from Wages

Wage Income-Student:

4,939

Wage Income Spouse:

0

Wages:

4,939

Student's Income from Wages page

The wage information displayed on this page depends on which Sequence row is active and the selections made for Filing Status.

Wage Income Student	Displays the student's wage income or the father's wage income.
Wage Income Spouse	Displays the spouse's wage income or the mother's wage income.
Wages	Displays the total wages from the wage income entries. The system uses this amount to populate the Wages field on the Tax Form Data page.

Entering Other Taxable Income

The elements that appear on the Other Taxable Income page are determined by the tax form indicated on the Tax Form Data page. For the 1040 tax form, Schedules B, C, D, E, F are available. For the 1040A form, Schedule 1 is available.

Access the Other Taxable Income page – 1040 Tax Form (click the Other Taxable Income link on the Tax Form Data page).

Other Taxable Income

Taxable Refund:

0

Alimony Income:

0

Total IRA Payments:

0

Taxable IRA Payments:

0

Total Pension:

0

Taxed Pension:

0

Social Security Benefits:

0

Taxed Social Security Benefits:

0

Unemployment Benefits:

0

Capital Gains/Loss:

Schedule D

0

Other Gains/Losses:

0

Other Taxed Income:

0

Subtotal:

0

Interest Income:

0

Schedule B

Tax Exempt Interest Income:

0

Dividend Income:

0

Business Income/Loss:

0

Schedule C

Add to Total Wages

☐

Rental Income, Trusts:

0

Schedule E

Farm Income/Losses:

0

Schedule F

Add to Total Wages

☐

Total Other Income:

0

Other Taxable Income page — 1040 Tax Form

The Add to Total Wages check box for Business Income Loss and the Add to Total Wages check box for Farm Income/Losses are selected by default. If selected, income or loss to wages is calculated to the total wages.

Access the Other Taxable Income page, 1040A form.

Other Taxable Income

Total IRA Payments:

0

Taxable IRA Payments:

0

Total Pension:

0

Taxed Pension:

0

Social Security Benefits:

0

Taxed Social Security Benefits:

0

Unemployment Benefits:

0

Capital Gains/Loss:

0

Subtotal:

0

Interest Income:

[Schedule 1](#)

0

Tax Exempt Interest Income:

0

Dividend Income:

0

Total Other Income:

0

Other Taxable Income page - 1040A Tax Form

Access the Other Taxable Income page, 1040EZ form.

Other Taxable Income

Interest Income

0

Unemployment Benefits

0

Total Other Income:

0

OK

Cancel

Other Taxable Income page — 1040EZ Tax Form

Entering Schedule 1 Information

Access the Schedule 1 page (click the Sch 1 link on the Other Taxable Income page).

Schedule 1

Part I - Interest Income

Total from Line 2:

0

Excludable Interest:

0

Total Interest Income:

0

Part II - Dividend Income

Total Dividend Income:

0

Schedule 1 page

Entering Schedule B Information

Access the Schedule B page (click the Sch B link on the Other Taxable Income page).

Schedule B

Interest Income

Total from Line 2:

0

Excludable Interest:

0

Total Interest Income:

0


Dividend Income

Total Ordinary Dividends:

0

Foreign Account and Trusts

☐ Foreign Account and Trusts

Country: 

☐ Foreign distribution

Schedule B page

Entering Schedule C Information

Access the Schedule C page (click the Sch C link on the Other Taxable Income page).

Schedule C

Principal Business:

Business Code:

Business Name:

EIN:

Accounting Method

☐ Cash

☐ Accrual

☒ Other

☐ Materially Participated

☐ Started or Acquired

Part I - Income

Gross Receipts or Sales:

0

Returns and Allowances:

0

Adjusted Gross Receipts/Sales:

0

Cost of Goods Sold:

0

Gross Profit:

0

Other Income:

0

Gross Income:

0

Part II - Expenses

Total Expenses:

0

Tentative Profit:

0

Home Expenses for Business:

0

Net Profit (or Loss):

0

☒ All Investment Is At Risk

☐ Some Investment Not At Risk

Schedule C page

Entering Schedule D Information

Access the Schedule D page (click the Sch D link on the Other Taxable Income page).

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Schedule D

Short Term Capital Gain (Loss)

Total from Schedule D-1 line 2:

0

Total Sales Price:

0

Net Loss/Gain from Schedule K1:

0

Loss Carryover:

0

Net Gain (or loss):

0

Long-Term Capital Gains and Losses

Total from Schedule D-1 line 9:

0

Total Sales Price:

0

Net Loss/Gain from Forms:

0

Net Loss/Gain from Schedule K1:

0

Capital Gain Distribution:

0

Loss Carryover:

0

Net Gain (or Loss):

0

Total Loss:

0

Total Gain:

0

Schedule D page

Entering Schedule E Information

Access the Schedule E page (click the Sch E link on the Other Taxable Income page).

Schedule E			
Rental Real Estate & Royalties			
Rents Received:	<input type="text" value="0"/>	Depreciation:	<input type="text" value="0"/>
Royalties Received:	<input type="text" value="0"/>	Income:	<input type="text" value="0"/>
Mortgage Interest:	<input type="text" value="0"/>	Losses:	<input type="text" value="0"/>
Expense Total:	<input type="text" value="0"/>	Total:	<input type="text" value="0"/>
Partnerships and S Corporations			
Income:	<input type="text" value="0"/>	Total:	<input type="text" value="0"/>
Loss:	<input type="text" value="0"/>		
Estates and Trusts			
EIN(A):	<input type="text"/>	Income:	<input type="text" value="0"/>
EIN(B):	<input type="text"/>	Loss:	<input type="text" value="0"/>
		Total:	<input type="text" value="0"/>
REMICs - Residual Holder			
Total:	<input type="text" value="0"/>		
Summary			
Farm Rental Income:	<input type="text" value="0"/>	Gross Farming:	<input type="text" value="0"/>
Total Income/Loss:	<input type="text" value="0"/>	Real Estate Income:	<input type="text" value="0"/>

Schedule E page

Entering Schedule F Information

Access the Schedule F page (click the Sch F link on the Other Taxable Income page).

Schedule F

Accounting Method:

Cash

Cash Method

Resale of livestock:	<input type="text" value="0"/>	Agricultural Payments:	<input type="text" value="0"/>	Taxable amount:	<input type="text" value="0"/>
Cost of livestock:	<input type="text" value="0"/>	Taxable amount:	<input type="text" value="0"/>	Amount deferred Prior Year:	<input type="text" value="0"/>
Resale minus Cost:	<input type="text" value="0"/>	CCC Loans Election:	<input type="text" value="0"/>	Custom Hire Income:	<input type="text" value="0"/>
Livestock sales:	<input type="text" value="0"/>	CCC Loans Forfeited:	<input type="text" value="0"/>	Other Income:	<input type="text" value="0"/>
Total Cooperative:	<input type="text" value="0"/>	Taxable amount:	<input type="text" value="0"/>	Gross Income:	<input type="text" value="0"/>
Taxable amount:	<input type="text" value="0"/>	Crop Insurance:	<input type="text" value="0"/>		

Accrual Method

Resale of Livestock:	<input type="text" value="0"/>	CCC Loan Forfeited:	<input type="text" value="0"/>	Livestock inventory (start):	<input type="text" value="0"/>
Cooperative Total:	<input type="text" value="0"/>	Taxable amount:	<input type="text" value="0"/>	Cost of Livestock:	<input type="text" value="0"/>
Taxable amount:	<input type="text" value="0"/>	Crop Insurance:	<input type="text" value="0"/>	Inventory plus Costs:	<input type="text" value="0"/>
Agricultural Payments:	<input type="text" value="0"/>	Custom Hire Income:	<input type="text" value="0"/>	Livestock inventory (end):	<input type="text" value="0"/>
Taxable amount:	<input type="text" value="0"/>	Other Income:	<input type="text" value="0"/>	Cost of Livestock:	<input type="text" value="0"/>
CCC Loans Election:	<input type="text" value="0"/>	Total amount:	<input type="text" value="0"/>	Gross Income:	<input type="text" value="0"/>

Schedule F page (1 of 2)

Expenses

Car/Truck:	<input type="text" value="0"/>	Mortgage Interest:	<input type="text" value="0"/>	Utilities:	<input type="text" value="0"/>
Chemicals:	<input type="text" value="0"/>	Other Interest:	<input type="text" value="0"/>	Veterinary:	<input type="text" value="0"/>
Conservation:	<input type="text" value="0"/>	Labor Hired:	<input type="text" value="0"/>	Other expenses:	1. <input type="text" value="0"/>
Custom Hire:	<input type="text" value="0"/>	Pension Plan:	<input type="text" value="0"/>		2. <input type="text" value="0"/>
Depreciation:	<input type="text" value="0"/>	Rental Vehicles:	<input type="text" value="0"/>		3. <input type="text" value="0"/>
Employee Benefit:	<input type="text" value="0"/>	Other Rent:	<input type="text" value="0"/>		4. <input type="text" value="0"/>
Feeds:	<input type="text" value="0"/>	Repairs:	<input type="text" value="0"/>		5. <input type="text" value="0"/>
Fertilizers:	<input type="text" value="0"/>	Seeds:	<input type="text" value="0"/>		6. <input type="text" value="0"/>
Freight:	<input type="text" value="0"/>	Storage:	<input type="text" value="0"/>	Total Expenses:	<input type="text" value="0"/>
Gasoline:	<input type="text" value="0"/>	Supplies:	<input type="text" value="0"/>	Net Profit (or Loss):	<input type="text" value="0"/>
Insurance:	<input type="text" value="0"/>	Taxes:	<input type="text" value="0"/>		
				<input type="checkbox"/> All Investment At Risk	
				<input type="checkbox"/> Some Investment No Risk	

Schedule F page (2 of 2)

Entering Income Adjustments

Access the Income Adjustments page (click the Income Adjustments link on the Tax Form Data page).

Income Adjustments

Educator expenses:	<input type="text" value="0"/>
Certain business expenses	<input type="text" value="0"/>
Health savings account	<input type="text" value="0"/>
Moving expenses:	<input type="text" value="0"/>
One-half self-employment tax:	<input type="text" value="0"/>
Keogh and Self-Empl Plans Ded:	<input type="text" value="0"/>
SE health insurance deduction:	<input type="text" value="0"/>
Penalty on early w/d of Saving:	<input type="text" value="0"/>
Alimony paid:	<input type="text" value="0"/>
Filer's IRA deduction:	<input type="text" value="50"/>
Student loan interest:	<input type="text" value="0"/>
Tuition and fees deduction:	<input type="text" value="0"/>
Domestic production activities	<input type="text" value="0"/>
Income Adjustments:	<input type="text" value="50"/>
<div><div>OK</div><div>Cancel</div></div>	

Income Adjustments page - 1040 Tax Form

The fields on this page match the order of the fields on the 1040 form.

Note. For a 1040A filer, the available fields are Educator expenses, Filer's IRA deduction, Student loan interest, and Tuition and fees deduction.

An Income Adjustments page is not available for a 1040EZ filer. Enter the total income adjustment value in the Income Adjustments field on the Tax Form Data page.

Entering Tax, Credits, and Payments

Access the Tax, Credits and Payments page (click the Tax, Credits, and Payments link on the Tax Form Data page).

Tax, Credits and Payments	
Taxable Income:	Schedule A <input type="text" value="2,634"/>
Tax:	<input type="text" value="456"/>
Alternative minimum tax:	<input type="text" value="0"/>
<hr/>	
Foreign tax credit:	<input type="text" value="0"/>
Child/Dependent Care Credit:	<input type="text" value="0"/>
Credit for elderly or disabled:	<input type="text" value="0"/>
Education credit:	<input type="text" value="111"/>
Retirement savings credit:	<input type="text" value="0"/>
Child tax credit:	<input type="text" value="0"/>
Forms 8396/8839/5695:	<input type="text" value="0"/>
Other credits:	<input type="text" value="0"/>
<hr/>	
Total Credits:	<input type="text" value="111"/>
<hr/>	
U.S. Tax Paid:	<input type="text" value="345"/>
<hr/>	
Earned Income Credit:	<input type="text" value="0"/>
Additional Child Tax Credit:	<input type="text" value="0"/>
<hr/>	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Tax, Credits and Payments page - 1040 Tax Form

Earned Income Credit Enter the amount deducted from tax due for qualified persons whose information is being verified.

Additional Child Tax Credit Enter an amount deducted from tax for households with three or more qualifying children.

Note. For a 1040A filer, the Tax, Credits, and Payments page does not include these fields: Foreign tax credit, Forms 8396/8839/8859, and Other credits.

For a 1040EZ filer, the Tax, Credits, and Payments page only includes these fields: Taxable Income, Tax, Earned Income Credit, and U. S. Tax Paid.

Viewing Schedule A Itemize Deductions

Access the Schedule A Itemize Deductions page (click the Sch A link on the Tax and Credits page from the Tax Form Data page).

Schedule A Itemize Deductions	
Medical and Dental Expenses	
Allowable Med/Dental Expense:	<input type="text" value="0"/>
Taxes You Paid	
State and Local Taxes:	<input type="text" value="0"/>
Real Estate Taxes:	<input type="text" value="0"/>
New Motor Vehicle Taxes:	<input type="text" value="0"/>
Other Taxes:	<input type="text" value="0"/>
Total taxes paid:	<input type="text" value="0"/>
Interest You Paid	
Home mortgage:	<input type="text" value="0"/>
Home mortgage (unreported):	<input type="text" value="0"/>
Points not reported to you:	<input type="text" value="0"/>
Qualified Mortgage Insurance:	<input type="text" value="0"/>
Investment interest:	<input type="text" value="0"/>
Total interest paid:	<input type="text" value="0"/>
Gifts To Charity	
Gifts by cash or check:	<input type="text" value="0"/>
Gifts other than cash or check:	<input type="text" value="0"/>
Carryover from prior year:	<input type="text" value="0"/>
Total gifts to charity:	<input type="text" value="0"/>
Casualty and Theft Losses	
Casualty or theft loss(es):	<input type="text" value="0"/>
Job Expense & Misc Deductions	
Unreimbursed employee expense:	<input type="text" value="0"/>
Tax preparation fees:	<input type="text" value="0"/>
Other expenses:	<input type="text" value="0"/>
Total of job expenses:	<input type="text" value="0"/>
Job Expense & Misc Deductions:	<input type="text" value="0"/>
Other Miscellaneous Deductions:	<input type="text" value="0"/>
Total Itemized Deduction:	<input type="text" value="30,890"/>

Schedule A Itemize Deductions page

Verifying W-2 Information

Access the W-2 Form page (Financial Aid, Verification, Manage 20nn-20nn Verification, W-2 Form).

Household Info

Tax Form Data

W-2 Form

Fed Untax Income

Fed Add Fin Info

Inst Untax Income

Nakahara, Kevin O

Aid Year: 2010

ID: FA0605

Institution: PSUNV

Application Data Verification

Find | View All

First

1 of 1

Last

☒ Student

☐ Spouse

☐ Father

☐ Mother

☐ Other/Step

Sequence: 1

Wage and Tax Statement

Find | View All

First

1 of 1

Last

Wages, Sal, & Tips: 0

Taxes Withheld: 0

Number: W21

Social security Wages: 0

SS Tax Withheld: 0

☐ Statutory

Medicare wages & tips: 0

Medicare Tax: 0

☐ PR Retirement Plan

Social security tips: 0

Allocated tips: 0

☐ Third-party sick pay

Advance EIC payment: 0

Dependent care: 0

Other: 0

Nonqualified plans: 0

[Box 12](#)

State: 0

Wages: 0

State Income Tax: 0

W-2 Form page

Application Data Verification

Sequence

Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. Ensure that you entering and viewing data for the correct row.

Wage and Tax Statement

Box 12

Click this link to enter or view information from Box 12 on the W-2 form.

Viewing W-2 Box 12 Information

Access the Verification W2 - Box 12 page (click the Box 12 link on the W-2 Form page).

Verification

W2 - Box 12

Code	Description	Year	Amount		
				+	-

Verification W2 - Box 12 page

Code

Refer to the W-2 instructions for details on valid values for the code.

Verifying Federal Untaxed Income

Access the Fed Untax Income page (Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Untax Income).

Household Info	Tax Form Data	W-2 Form	Fed Untax Income	Fed Add Fin Info	Tax Data Consolidation																								
Bentivoglio, Christine M			ID: FA0643																										
Aid Year: 2010			Institution: PSUNV																										
Federal Untaxed Income Find View All First 1 of 1 Last																													
<input checked="" type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Father <input type="radio"/> Mother <input type="radio"/> Other/Step Sequence: 1																													
<table> <tr> <td>Tax-deferred Pension/Savings:</td> <td>200</td> </tr> <tr> <td>IRA/SEP/KEOGH Deduction:</td> <td>300</td> </tr> <tr> <td>Child Support Received:</td> <td>325</td> </tr> <tr> <td>Tax Exempt Interest Income:</td> <td>250</td> </tr> <tr> <td>Untaxed IRA:</td> <td>300</td> </tr> <tr> <td>Untaxed Pension:</td> <td>400</td> </tr> <tr> <td>Military/Clergy Allowance:</td> <td>350</td> </tr> <tr> <td>Veterans Non-Ed Benefits:</td> <td>375</td> </tr> <tr> <td>Other Untaxed Income:</td> <td>425</td> </tr> <tr> <td>Other Unreported Income:</td> <td>450</td> </tr> <tr> <td colspan="2"><hr/></td> </tr> <tr> <td>Total Other Untaxed Income:</td> <td>3,375</td> </tr> </table>						Tax-deferred Pension/Savings:	200	IRA/SEP/KEOGH Deduction:	300	Child Support Received:	325	Tax Exempt Interest Income:	250	Untaxed IRA:	300	Untaxed Pension:	400	Military/Clergy Allowance:	350	Veterans Non-Ed Benefits:	375	Other Untaxed Income:	425	Other Unreported Income:	450	<hr/>		Total Other Untaxed Income:	3,375
Tax-deferred Pension/Savings:	200																												
IRA/SEP/KEOGH Deduction:	300																												
Child Support Received:	325																												
Tax Exempt Interest Income:	250																												
Untaxed IRA:	300																												
Untaxed Pension:	400																												
Military/Clergy Allowance:	350																												
Veterans Non-Ed Benefits:	375																												
Other Untaxed Income:	425																												
Other Unreported Income:	450																												
<hr/>																													
Total Other Untaxed Income:	3,375																												

Fed Untax Income page

Federal Untaxed Income

You can view and enter data in some fields on this page. Other fields are display only.

The Other Unreported Income field is not included for parent rows.

The following fields are display only fields. For all other fields on the page, you can view and enter data.

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.

Untaxed IRA (Untaxed Individual Retirement Account)	Displays the amount of funds disbursed from an IRA that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between Total IRA payments and Taxable IRA payments.
Untaxed Pension	Displays the amount of pension earnings that are untaxed. This amount writes from the Other Taxable Income page and is the difference between Total Pension and Taxed Pension.
Total Other Untaxed Income	Displays the total of the amounts in the untaxed income fields on this page.

Verifying Federal Additional Financial Information

Access the Fed Add Fin Info page (Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Add Fin Info).

Household Info | Tax Form Data | W-2 Form | Fed Untax Income | **Fed Add Fin Info** | Tax Data Consolidation

Sandoval, Johana J ID: FA0632
Aid Year: 2011 Institution: PSUNV

Federal Additional Financial Information Find | View All First 2 of 2 Last

☐ Student ☐ Spouse ☐ Father ☒ Mother ☐ Other/Step Sequence: 2

Education credit:	20
Child Support Paid:	<input type="text" value="30"/>
Taxed Work-Study/Fellow/Assist:	<input type="text" value="40"/>
Grant/Scholarship Aid:	<input type="text" value="50"/>
Combat Pay:	<input type="text" value="60"/>
Co-op Earnings:	<input type="text" value="70"/>
Add. Financial Total:	270

Fed Add Fin Info page

Federal Additional Financial Information

You can view and enter data in some fields on this page. Other fields are display only.

Education credit Displays the Education Credit. This amount writes from the Tax, Credits, and Payments page.

Add. Financial Total (Additional Financial Total) Displays the total for all additional financial information fields on this page.

You can enter and view data in the other fields.

Verifying Institutional Untaxed Income

Access the Inst Untax Income page (Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Untax Income).

Household Info		Tax Form Data		W-2 Form		Inst Untax Income		Inst Other Taxable	
BALDWIN, STEVEN A						ID: FA1003			
Aid Year: 2011						Institution: PSUNV			
Institutional Untaxed Income						Find View All First 1 of 2 Last			
<input checked="" type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Father <input type="radio"/> Mother <input type="radio"/> Other/Step						Sequence: 1			
IRA/SEP/KEOGH Deduction:		145		Untaxed SS Benefits:		100			
Tax Exempt Interest Income:		110		Earned Income Credit:		105			
Additional Child Tax Credit:		115		Welfare TANF:		<input type="text" value="120"/>			
Military Allowance:		<input type="text" value="130"/>		Child Support Received:		<input type="text" value="125"/>			
VA Work-Study:		<input type="text" value="155"/>							
Tax-deferred Pension/Savings:		<input type="text" value="135"/>							
Veterans Non-Ed Benefits:		<input type="text" value="150"/>							
Workers Compensation:		<input type="text" value="140"/>							
Other Unreported Income:		<input type="text" value="160"/>							
Other Untaxed Income:		<input type="text" value="165"/>							
Total Other Untaxed Income:		1,405							

Inst Untax Income page

Institutional Untaxed Income — Student

You can view and enter data in some fields on this page. Other fields are display only.

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
---	---

Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.
Total Other Untaxed Income	Displays the total for the following fields: IRA/SEP/KEOGH Deduction, Tax Exempt Interest Income, Additional Child Tax Credit, Military Allowance, VA Work-Study, Tax-deferred Pension/Savings, Veterans Non-Ed Benefits, Workers Compensation, Other Unreported Income, Other Untaxed Income.

You can enter and view data in the other fields on this page.

Institutional Untaxed Income — Parent

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.
Untaxed IRA (Untaxed Individual Retirement Account)	Displays the amount of funds disbursed from an IRA that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between Total IRA payments and Taxable IRA payments.
Untaxed Pension	Displays the amount of pension earnings that are untaxed. This amount writes from the Other taxable Income page and is the difference between Total Pension and Taxed Pension.

Tuition and fees deduction	Displays the amount of tuition and fees deduction. This amount writes from the Income Adjustments page.
Total Other Untaxed Income	Displays the total for the following fields: Veterans Non-Ed Benefits, Workers Compensation, Black Lung/Refugee, Untaxed Railroad Retirement, and Other Untaxed Income.

You can enter and view data in the other fields.

Verifying Institutional Other Taxable Income

Access the Inst Other Taxable page (Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Other Taxable).

Household InfoTax Form DataW-2 FormInst Untax IncomeInst Other Taxable

Sanko,Don G S

Aid Year: 2010

ID: 0080

Institution: PSUNV

Institutional Other Taxable Income

Find | View All

First1 of 2Last

☒ Student☐ Spouse☐ Father☐ Mother☐ Other/Step

Sequence: 1

Combat Pay:

25

Grant/Scholarship Aid:

30

Taxed Work-Study/Fellow/Assist:

35

Taxed Financial Aid:

65

Inst Other Taxable page

Institutional Other Taxable Income — Student

Taxed Financial Aid Displays total for Grant/Scholarship Aid and Taxed Work-Study/Fellow/Assist fields. Combat Pay is not included in this total.

You can enter and view data in the other fields.

Institutional Other Taxable Income — Parent

Taxable Refund	Displays taxable refunds. This amount writes from the Other Taxable Income page.
Alimony Income	Displays alimony income. This amount writes from the Other Taxable Income page.
Capital Gains/Loss	Displays capital gains/loss. This amount writes from the Other Taxable Income page.
Other Gains/Losses	Displays other gains/losses. This amount writes from the Other Taxable Income page.
Taxable IRA/Keogh	Displays other taxable IRA/Keogh. This amount writes from the Other Taxable Income page.
Taxed Pension	Displays taxed pension. This amount writes from the Other Taxable Income page.
Unemployment Benefits	Displays unemployment benefits. This amount writes from the Other Taxable Income page.
Taxed Social Security Benefits	Displays taxed social security. This amount writes from the Other Taxable Income page.
Other Taxed Income	Displays other taxed income. This amount writes from the Other Taxable Income page.
Combat Pay	Enter or view the combat pay amount.
Total Other Income	Displays total for other taxable fields on this page. Combat Pay is not included in this total.

Consolidating Forms

Access the Tax Data Consolidation page (Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Data Consolidation).

Tax Form Data | W-2 Form | Fed Untax Income | Fed Add Fin Info | **Tax Data Consolidation**

Cowger, Denny E
Aid Year: 2010

ID: FA0633
Institution: PSUNV

Find | View All | First 1 of 2 Last

Tax Return Filer
☒ Student ☐ Spouse ☐ Father ☐ Mother **Status:** Tax Data Consolidated

Consolidate [Consolidated Tax Data](#)

Tax Data Consolidation page

- | | |
|------------------------------|---|
| Sequence | Displays the sequence number for the row of information to be verified. |
| Consolidate | Click the Consolidate button to combine all income and resources. |
| Consolidated Tax Data | Click this link to view or edit all tax and resource information on the Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not be saved if you run consolidation after the changes are made. |

Viewing Consolidated Tax Data

Access the Consolidated Tax Data page (click the Consolidated Tax Data link on the Tax Data Consolidation page).

Consolidated Tax Data

Student's Tax Data

Number of Family Members:	<input type="text" value="01"/>	Marital Status:	<input type="text" value="Unmarried"/>
Number In College:	<input type="text" value="1"/>	Tax Return Filed?	<input type="text" value="Filed/Comp"/>
Number of Exemptions:	<input type="text" value="00"/>	Tax Form Filed:	<input type="text" value="1040A"/>
Dependents:	<input type="text" value="No"/>	Eligible For 1040A or 1040EZ	<input type="text" value="Yes"/>
Wage Income-Student:	<input type="text" value="3,277"/>	Welfare/TANF:	<input type="text" value="0"/>
Wage Income Spouse:	<input type="text" value="0"/>	Child Support Received:	<input type="text" value="30"/>
Dividend and Interest Income:	<input type="text" value="0"/>	IRA/KEOGH/SEP Deduction:	<input type="text" value="20"/>
Itemized Deductions:	<input type="text" value="0"/>	Tax-deferred Pension/Savings:	<input type="text" value="10"/>
AGI:	<input type="text" value="3,372"/>	Military/Clergy Allowance:	<input type="text" value="70"/>
Taxes Paid:	<input type="text" value="345"/>	Tax Exempt Interest Income:	<input type="text" value="40"/>
Untaxed Social Security:	<input type="text" value="0"/>	Other Untaxed Income:	<input type="text" value="90"/>
Education Credit:	<input type="text" value="110"/>	Child Support Paid:	<input type="text" value="120"/>
Non-Ed Vet Benefit:	<input type="text" value="80"/>	Earned Income Credit:	<input type="text" value="0"/>
Other Unreported Income:	<input type="text" value="100"/>	Grant/Scholarship:	<input type="text" value="140"/>
Untaxed IRA:	<input type="text" value="50"/>	Tax Work-Study/Fellow/Assist:	<input type="text" value="130"/>
Untaxed Pension:	<input type="text" value="60"/>	Taxed Financial Aid:	<input type="text" value="0"/>
Co-op Earnings:	<input type="text" value="160"/>	Combat Pay:	<input type="text" value="150"/>

Consolidated Tax Data page (1 of 2)

Parent's Tax Data			
Number of Family Members:	<input type="text" value="05"/>	Marital Status:	<input type="text" value="Married"/>
Number In College:	<input type="text" value="1"/>	Tax Return Filed?	<input type="text" value="Filed/Comp"/>
Number of Exemptions:	<input type="text" value="05"/>	Tax Form:	<input type="text" value="1040"/>
Wages, Salaries, & Tips:	<input type="text" value="65,342"/>	Eligible For 1040A or 1040EZ?	<input type="text" value="No"/>
Wage Income Father:	<input type="text" value="22,001"/>	Untaxed Social Security:	<input type="text" value="0"/>
Wage Income-Mother:	<input type="text" value="43,341"/>	Welfare/TANF:	<input type="text" value="0"/>
Dividend Income:	<input type="text" value="0"/>	Child Support Received:	<input type="text" value="95"/>
Interest Income:	<input type="text" value="652"/>	IRA/KEOGH/SEP Deduction:	<input type="text" value="90"/>
Bus/Farm/Rent Income:	<input type="text" value="31,755"/>	Tax-deferred Pension/Savings:	<input type="text" value="85"/>
Other Taxable Income:	<input type="text" value="265"/>	Tax-deferred Med/Dep Care Pmts:	<input type="text" value="0"/>
Itemized Deductions:	<input type="text" value="30,890"/>	Military/Clergy Allowance:	<input type="text" value="125"/>
Income Adjustments:	<input type="text" value="90"/>	Military Allowance:	<input type="text" value="0"/>
AGI:	<input type="text" value="97,924"/>	Living Allowance:	<input type="text" value="0"/>
Taxes Paid:	<input type="text" value="5,991"/>	Tax Exempt Interest Income:	<input type="text" value="100"/>
Education Credit:	<input type="text" value="20"/>	Other Untaxed Income:	<input type="text" value="135"/>
Non-Ed Vet Benefit:	<input type="text" value="130"/>	Child Support Paid:	<input type="text" value="30"/>
Untaxed IRA:	<input type="text" value="115"/>	Earned Income Credit:	<input type="text" value="0"/>
Untaxed Pension:	<input type="text" value="120"/>	Tuition and fees deduction	<input type="text" value="0"/>
Foreign Income Exclusions:	<input type="text" value="0"/>	Grant/Scholarship:	<input type="text" value="50"/>
Additional Child Tax Credit:	<input type="text" value="0"/>	Tax Work-Study/Fellow/Assist:	<input type="text" value="40"/>
IM Other Untaxed Income:	<input type="text" value="0"/>	Combat Pay:	<input type="text" value="60"/>
		Co-op Earnings:	<input type="text" value="70"/>
		Family Support Income:	<input type="text" value="0"/>

Consolidated Tax Data page (2 of 2)

Note. The fields on this page compare to your target tables.

Student's Tax Data

Number of Family Members

Number of members in the family for the student or parents of a dependent student.

Number in College	Number of family members in college for the student or parents of a dependent student.
Number of Exemptions	Number of exemptions claimed by either the student or the parent.
Dependents	Indicates if person being verified has dependents. Valid for student for parent. Values are: <i>Yes</i> – dependents, <i>No</i> – No dependents.
Wage Income – Student	Wage earnings for student.
Wage Income – Spouse	Wage earnings for student's spouse.
Dividend and Interest Income	Dividend and interest income for the student from Other Taxable Income pages. This view is not valid for the parents.
Itemized Deductions	Amount of allowable deductions for tax filers from Tax, Credits, and Payments page for the student or parent.
AGI (adjusted gross income)	Adjusted gross income for the parent or student.
Taxes Paid	Taxes paid by the student or parent.
Untaxed Social Security	Amount of untaxed social security income calculated for the student or the parent.
Education Credit	Amount of allowable Hope and Lifetime Learning education credits for student or parent.
Non-Ed Vet Benefit	Amount of Non Educational Veteran Benefits for student or parent.
Other Unreported Income	Amount of untaxed unreported income for student or parent.
Untaxed IRA	Amount of untaxed IRA calculated for the student or parent.
Untaxed Pension	Amount of untaxed Pension calculated for the student or parent.
Co-Op Earnings	Amount of Co-op Earnings for student or parent.
Marital Status	Displays the marital status of either the student or parent. Values are: <i>Div/Sep</i> (divorced or separated) <i>Married</i> <i>Single</i> <i>Widowed</i>

Tax Return Filed?	<p>Tax return information of either the student or the parent. Values are:</p> <p><i>Filed/Comp</i>: Return filed, completed.</p> <p><i>Not Filed</i>: Tax return is not filed.</p> <p><i>Will File</i>: Tax form will be filed.</p>
Tax Form Filed	<p>Tax form type that was filed by the student or parent. Values are:</p> <p><i>1040</i>: Filer used the IRS tax form 1040.</p> <p><i>1040A</i>: Filer used the IRS tax form 1040A.</p> <p><i>1040EZ</i>: Filer used the IRS tax form 1040EZ.</p> <p><i>Canadian</i></p> <p><i>Foreign Tx</i></p> <p><i>Puerto Rico</i></p> <p><i>Territory</i></p>
Eligible for 1040A or 1040EZ	Indicate whether the filer is eligible to file either the 1040A or 1040EZ tax form.
Welfare/TANF (Temporary Assistance for Needy Families)	Amount of public assistance paid to the student or parent.
Child Support Received	Amount of child support received by either the student or the parent.
IRA/KEOGH Deduction (IRA/Keogh deduction payments)	Amount of IRA/KEOGH payments for the student or parent.
Tax Deferred Pension/Savings	Amount of pre-tax pension or savings deferred for the student or the parent.
Military/Clergy Allowance	Amount of military/clergy living allowance received for the student or parent.
Tax Exempt Interest Income	Amount of untaxed interest paid to either the student or the parent.
Other Untaxed Income	Amount of other untaxed income earned by either the student or the parent.
Child Support Paid	Amount of child support paid either to the student or to the parent.
Earned Income Credit	Amount of earned income credit claimed by either the student or the parent.
Grant/Scholarship	Amount of grant and scholarship aid reported by the student or parent.
Tax Work-Study/Fellow/Assist	Amount of taxable work-study, fellowship and assistantship reported by the student or parent.
Taxed Financial Aid	Amount of combined grant, scholarship, work-study, fellowship, and assistantship reported by the student or parent.

Combat Pay Amount of Combat Pay for student or parent.

Parent's Tax Data

Many fields in the parent section are the same as those in the student section. Fields that are for students only or are for parents only are listed here.

The Dividend and Interest Income field is in the student section only and is not valid for parents.

The following fields are in the parent section only and are not valid for students:

Wages, Salaries, & Tips Total of wages, salaries, and tips for parent.

Wage Income – Father Wage earnings for student's father.

Wage Income – Mother Wage earnings for student's mother.

Dividend Income Dividend income for the parent from Other Taxable Income pages.

Interest Income Interest income for the parent from Other Taxable Income pages.

Bus/Farm/Rent Income Business, farm or rental income for the parent.
(Business/Farm/Rental Income)

Other Taxable Income Other taxable income for the parent.

Income Adjustments Income adjustments for the parent.

Foreign Income Exclusions Amount of a foreign income exemption claimed by either the student or the parent.

Additional Child Tax Credit Amount of a additional child tax credit for the parents.

IM Other Untaxed Income Amount of IM Other Untaxed Income for the parents.

Untaxed Social Security Amount of Social Security wages above the taxable limit for either the student or the parent.

Tax Deferred Med/Dep Care Pmts (tax deferred medical/dependent care payments) Amount of medical or dependent care tax deferred payments deferred for the parents.

Military Allowance (tax deferred medical/dependent care payments) Amount of Military Allowance for the parents.

Living Allowance (tax deferred medical/dependent care payments)	Amount of Living Allowance for the parents.
Tuition and fees deduction	Amount of tuition and fees deduction claimed by the parents.
Family Support Income (tax deferred medical/dependent care payments)	Amount of Family Support Income for the parents.
Wages, Salaries, & Tips	Total of wages, salaries, and tips for parent.
Dividend Income	Dividend income for the parent.
Interest Income	Interest income for the parent.

Working with Auto Verification

This section discusses how to:

- Use auto verification.
- Edit student level tolerances.
- Edit verification status.
- Compare verification results.

Pages Used for Auto Verification

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Auto Verification	VERIF_COMP_DTL	Financial Aid, Verification, Perform Auto Verification, Auto Verification	Perform comparison of source and target data. Compare income documents to financial aid applications or compare ISIR to Institutional data. View comparison results to determine whether to update the target table with source information.
Student's Verification Tolerance	VERIF_STU_TOLS_SEC	Click the Student Tolerance Setup link on the Auto Verification page.	View or edit tolerance levels.

Page Name	Definition Name	Navigation	Usage
Edit Verification Status	VERIF_RES_STAT_SEC	Click the Edit Status button on the Auto Verification page.	View or change verification codes or statuses.
Verification Compare Results	VERIF_TEST_DTL_SEC	Click the Field Comparison Detail link on the Auto Verification page.	View a summary of fields that were compared and for which the system indicated a variance.

Using Auto Verification

Access the Auto Verification page (Financial Aid, Verification, Perform Auto Verification, Auto Verification).

Auto Verification

Kevin Nakahara
ID: FA0605

Aid Year: 2010 Financial Aid Year 2009 - 2010
Institution: PSUNV

Find | View All First 1 of 1 Last

Verification Type: Federal
Source: Tax/Verif
Target: ISIR
Application Type:
Pass/Fail Option: Federal

☐ Mark Assumptions as Verified
☐ Set to Send ISIR Correction
☐ Use Student Level Override

Verification Sequence: 1
Perform Compare
Apply Changes
[Student Tolerance Setup](#)

Results

Date:	Execution Type:	Pass or Fail:
Tolerance: 400	FED Verification Status: Not Select	Edit Status No field differences
Variance: 0	INST Processing Status: Incomplete	
FED Variance: 0		

Auto Verification page

Verification is the process of comparing source data to a target set of data. Use this page to set up verification parameters.

Verification Type

Select from:

Federal: Applies federal tolerance levels to this verification.

Institutional: Applies institutional tolerance levels to this verification.

Source	<p>This is a translate field and should not be adjusted. Values are:</p> <p><i>Inst App</i>: Data from the Institutional Application tables.</p> <p><i>ISIR</i>: Data from the ISIR Data Corrections tables.</p> <p><i>Tax/Verif</i>: Selected data from the Application Data Verification pages created from the Consolidate routine.</p>
Target	<p>This is a translate field. Translate values should not be adjusted. Values include:</p> <p><i>Inst App</i>: Data from the Maintain Institutional Application tables.</p> <p><i>ISIR</i>: Data from the ISIR Data Corrections tables.</p>
Application Type	<p>Values are:</p> <p><i>Inst App</i>: Institutional application</p> <p><i>NA</i>: Need Access (for 2010 and prior aid years only)</p> <p><i>Profile</i>: PROFILE application</p> <p><i>FT - CSL</i>: Full-time Canadian student loan</p> <p><i>PT - CSL</i>: Part-time Canadian student loan</p>
Pass/Fail Option	<p>Set the parameter for your pass or fail flag value to evaluate based on either the federal total tolerance or for any one field out of a selected tolerated amount. Values are:</p> <p><i>Federal</i>: Select to evaluate pass or fail eligibility based on Total Tolerance Federal or Total Tolerance Institutional amount set in Verification Tolerance Setup.</p> <p>Refer to the "Understanding Federal Variance Calculation" section earlier in this chapter.</p> <p>See Chapter 25, "Assessing Eligibility for Financial Aid," Understanding Federal Variance Calculation, page 784.</p> <p><i>Field</i>: Used with institutional or federal selection. Select to evaluate pass or fail eligibility based on institutional or federal field level tolerances set in the Verification Tolerance setup. Total tolerances for institutional levels are capped, while federal levels are not capped.</p>
Mark Assumptions as Verified	<p>Use this option only when the Source value is <i>Tax/Verif</i> and the Target value is <i>ISIR</i>. Select to tag fields originally identified as Assumption fields with a field status of <i>Verified</i>. Assumed ISIR data fields that result from the federal methodology calculation are maintained on secondary pages of the ISIR Data Corrections pages.</p>
Set to Send ISIR Correction	<p>Select this check box to set the Correction Status to <i>Send</i> on ISIR corrections when the Apply Changes button is selected.</p>
Use Student Level Override	<p>Select this check box to apply verification tolerance levels for this student. This selection overrides the tolerance levels set up at the global level. Select when you want to activate changes made in the Student Tolerance setup.</p>

Verification Sequence	Displays the verification sequence number, which tracks multiple background processes. Row insertion is suggested for sequencing online iterations. Use it to track the results and accompanying verification setup performed for this student.
Perform Compare	Click this button to compare your target and source data and to activate the Field Comparison Detail link when variances are found.
Apply Changes	Click this button to move marked fields to the target tables when fields that you mark as <i>Apply</i> in Field Comparison Detail (see View Field Comparison Detail) are acceptable.
Student Tolerance Setup	Click this link to open a page to view or edit tolerance values at the student level.

Results

The system displays the results of the most recent verification setup. The fields include Date, Tolerance, Variance, Fed Variance, Execution Type, FED Verification Status, INST Processing Status, and Pass or Fail.


Click the Edit Status link to access the Edit Verification Status page, where you can change the program-generated verification statuses for federal and institutional verification and processing.

Editing Student Level Tolerances

Access the Student's Verification Tolerance page (click the Student Tolerance Setup link on the Auto Verification page).

Student's Verification Tolerance

ID: FA0605 **Total Tolerance Federal:** **Total Tolerance Institutional:**

Field Tolerance [Customize](#) | [Find](#) |  First Last

Use **Federal Verification** **Institutional Verification**

Field Number	Field Name	Federal	Institutional	
<input type="text" value="1"/>	Students Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	Parents Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="3"/>	Students Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="4"/>	Parents Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="5"/>	Students Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="6"/>	Parents Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="7"/>	Students Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="8"/>	Parents Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="9"/>	Students Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="10"/>	Parents Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="11"/>	Does Student Have Legal Dep	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="12"/>	Students AGI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="13"/>	Parents AGI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="14"/>	Students Federal Taxes Paid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="15"/>	Parents Federal Taxes Paid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="16"/>	Students Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="17"/>	Fathers Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="18"/>	Students Spouse Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="19"/>	Mothers Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="27"/>	Student Eligible for 1040A-EZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="28"/>	Parent Eligible for 1040A-EZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="29"/>	Tax Return Filed by Student?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="-"/>

Student's Verification Tolerance page

Federal Verification Tab

Access the Student's Verification Tolerance page: Federal Verification tab (click the Federal Verification tab on the Student's Verification Tolerance page).

Student's Verification Tolerance

ID: FA0605 Total Tolerance Federal: 400 Total Tolerance Institutional: 400

Field Tolerance Customize | Find | First 1-71 of 71 Last

Use **Federal Verification** Institutional Verification

Field Number	Field Name	Dependent	Independent	Tolerance Type	Tolerance Amount	
1	Students Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
2	Parents Number in College	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		-
3	Students Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
4	Parents Family Size	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		-
5	Students Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
6	Parents Number of Exemptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		-
7	Students Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
8	Parents Marital Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		-
9	Students Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
10	Parents Tax Form Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount		-
11	Does Student Have Legal Dep	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-
12	Students AGI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1	-
13	Parents AGI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1	-
14	Students Federal Taxes Paid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1	-
15	Parents Federal Taxes Paid	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1	-
16	Students Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1	-
17	Fathers Wage Income	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1	-
18	Students Spouse Wage Income	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1	-
19	Mothers Wage Income	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1	-
27	Student Eligible for 1040A-EZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount		-

Student's Verification Tolerance page: Federal Verification tab

Institutional Verification Tab

Access the Student's Verification Tolerance page: Institutional Verification tab (click the Institutional Verification tab on the Student's Verification Tolerance page).

Student's Verification Tolerance

ID: FA0605 **Total Tolerance Federal:** **Total Tolerance Institutional:**

Field Tolerance Customize | Find | First 1-71 of 71 Last

Use **Federal Verification** **Institutional Verification**

Field Number	Field Name	Dependent	Independent	Tolerance Type	Tolerance Amount	
1	Students Number in College	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
2	Parents Number in College	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	<input type="text"/>	
3	Students Family Size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
4	Parents Family Size	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	<input type="text"/>	
5	Students Number of Exemptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
6	Parents Number of Exemptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	<input type="text"/>	
7	Students Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
8	Parents Marital Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	<input type="text"/>	
9	Students Tax Form Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
10	Parents Tax Form Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	<input type="text"/>	
11	Does Student Have Legal Dep	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	<input type="text"/>	
12	Students AGI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1 <input type="text"/>	
13	Parents AGI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1 <input type="text"/>	
14	Students Federal Taxes Paid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1 <input type="text"/>	
15	Parents Federal Taxes Paid	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1 <input type="text"/>	
16	Students Wage Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1 <input type="text"/>	
17	Fathers Wage Income	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1 <input type="text"/>	
18	Students Spouse Wage Income	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Use Amount	1 <input type="text"/>	
19	Mothers Wage Income	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use Amount	1 <input type="text"/>	
27	Student Eligible for 1040A-EZ	<input type="checkbox"/>	<input type="checkbox"/>	Use Amount		

Student's Verification Tolerance page: Institutional Verification tab

Editing Verification Status

Access the Edit Verification Status page (click the Edit Status button on the Auto Verification page).

Edit Verification Status

Verification Status

ISIR Transaction Nbr:

FED Verification Status:

FED Processing Status:

INST Verification Status:

INST Processing Status:

Edit Verification Status page

You can update the verification and processing status fields that reside on the Packaging Status Summary page. The compare process automatically updates the status to *Pending* if the comparison results exceed the tolerance. If the ISIR transaction number is 1 and the verification process passes, then the verification status changes to *Accurate*.

Note. The Field Comparison Detail link is active only after the Perform Compare is run.

Use the Field Comparison Detail link to view the field differences on the Verification Compare Results page. Only fields that have differences appear. To use the source data to update your target tables, select the Apply check box for the fields. If you do not select the Apply check box, the field value remains the same as that in your target.

Comparing Verification Results

Access the Verification Compare Results page (click the Field Comparison Detail link on the Auto Verification page).

Verification Compare Results

Compared Field	Apply	Done	Source	Target	Difference	Tolerance
1 Students Number in College	<input type="checkbox"/>	<input type="checkbox"/>	1	0	1	0
3 Students Family Size	<input type="checkbox"/>	<input type="checkbox"/>	1	0	1	0
4 Parents Family Size	<input type="checkbox"/>	<input type="checkbox"/>	5	3	2	0
6 Parents Number of Exemptions	<input type="checkbox"/>	<input type="checkbox"/>	5	3	2	0
12 Students AGI	<input type="checkbox"/>	<input type="checkbox"/>	3,372	4,122	750	1
13 Parents AGI	<input type="checkbox"/>	<input type="checkbox"/>	97,924	41,573	56,351	1
14 Students Federal Taxes Paid	<input type="checkbox"/>	<input type="checkbox"/>	345	944	599	1
15 Parents Federal Taxes Paid	<input type="checkbox"/>	<input type="checkbox"/>	5,991	3,866	2,125	1
16 Students Wage Income	<input type="checkbox"/>	<input type="checkbox"/>	3,277	4,122	845	1
17 Fathers Wage Income	<input type="checkbox"/>	<input type="checkbox"/>	22,001	0	22,001	1
19 Mothers Wage Income	<input type="checkbox"/>	<input type="checkbox"/>	43,341	41,573	1,768	1

Verification Compare Results page

This page lists fields with differences. You can select to update all or only select fields for moving to ISIR or Institution tables.

Apply

Select this check box to use the source data to update your target tables. If you do not select the Apply check box, the field value remains the same as that in your target.

Source

This data comes from the source table, tax/verification, ISIR, or institutional application.

Target	This data comes from the target table, ISIR, or institutional application.
Difference	Displays the difference between the source and target information.
Tolerance	Displays the tolerance level established during tolerance setup. For example, a tolerance value of 100 for Parent's AGI means that a difference greater than 100 should not occur between the source and the target.

Using Batch Verification

This section discusses how to:

- Process batch consolidation.
- Use batch consolidation detail.
- View consolidated tax data.
- Process batch verification.
- Use batch verification results.
- Use batch verification summary.
- Use batch verification detail.

Pages Used for Batch Verification

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Consolidation	RUNCTL_FA_CONSL	Financial Aid, Verification, Perform Batch Consolidation, Batch Consolidation	Set consolidation parameters for batch consolidation and run the process.
Batch Consolidation Detail	VERIF_CONSUL_SMRY	Financial Aid, Verification, View Batch Consolidation, Batch Consolidation Detail	View batch consolidation results at the student level from the Application Data Verification - Tax Consolidation Consolidated Tax Data page.
Consolidated Tax Data	VERIF04_CONSL_SEC2	Click the Consolidated Tax Data link on the Batch Consolidation Detail inquiry page.	View consolidated tax information for a student or parent.
Batch Verification	RUNCTL_FAPCMPR1_01	Financial Aid, Verification, Perform Batch Verification, Batch Verification	Set parameters to verify batches and to run the process.

Page Name	Definition Name	Navigation	Usage
Batch Verification Results	RUNCTL_VERIF_SEC	Click the Results link on the Batch Verification Results page.	View summary verification information.
Batch Verification Summary	VERIF_COMP_SMRY	Financial Aid, Verification, View Verification Summary, Batch Verification Summary	View summary verification information.
Batch Verification Detail	STDNT_VERIF_DTL1	Financial Aid, Verification, View Verification Detail, Batch Verification Detail	View detail verification information from the Field Comparison Detail button on the Auto Verification page.

Processing Batch Consolidation

Access the Batch Consolidation page (Financial Aid, Verification, Perform Batch Consolidation, Batch Consolidation).

Batch Consolidation

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Consolidation Parameters

*Institution: PSUNV

Aid Year: 2010

Selection Criteria: Unconsolidated

Batch Consolidation page

In the Consolidation Parameters group box, select *Unconsolidated* or *All Stdnts in Verification* for the Selection Criteria field.

Using Batch Consolidation Detail

Access the Batch Consolidation Detail page (Financial Aid, Verification, View Batch Consolidation, Batch Consolidation Detail).

Batch Consolidation Detail

Institution:

PSUNV

PeopleSoft University

Batch Sequence Number:

2

Aid Year:

2010

Financial Aid Year 2009 - 2010

Run Date and Time:

12/16/2008 10:09:34PM

Students Selected:

8


User ID:



PS

Students Processed:

8

Selected Population

Customize | Find | View All | 

First  1-8 of 8  Last

ID	Name	Processing Status	
1 0056	Turnpenter,Rond A	Processed	Consolidated Tax Data
2 0072	Byron,Allon P	Processed	Consolidated Tax Data
3 FA0613	Contreras,Victoria R	Processed	Consolidated Tax Data
4 FA0632	Sandoval,Johana J	Processed	Consolidated Tax Data
5 FA0633	Cowger,Denny E	Processed	Consolidated Tax Data
6 FA0637	Green,Dolly M	Processed	Consolidated Tax Data
7 FA0642	Paslay,Zayna V	Processed	Consolidated Tax Data
8 FA0643	Bentivoglio,Christine M	Processed	Consolidated Tax Data

Batch Consolidation Detail page

Viewing Consolidated Tax Data

Access the Consolidated Tax Data page (click the Consolidated Tax Data link on the Batch Consolidation Detail inquiry page).

Consolidated Tax Data**Student's Tax Data**

Number of Family Members:	01	Marital Status:	Unmarried
Number In College:	1	Tax Return Filed?	Filed/Comp
Number of Exemptions:	00	Tax Form:	1040A/EZ/T
Dependents:	No	Eligible For 1040A or 1040EZ	Yes
Wage Income-Student:	5,434	Welfare/TANF:	0
Wage Income Spouse:	0	Child Support Received:	33
Dividend and Interest Income:	0	IRA/KEOGH/SEP Deduction:	50
Itemized Deductions:	0	Tax-deferred Pension/Savings:	11
AGI:	5,404	Military/Clergy Allowance:	77
Taxes Paid:	345	Tax Exempt Interest Income:	25
Untaxed Social Security:	0	Other Untaxed Income:	99
Education Credit:	111	Child Support Paid:	112
Non-Ed Vet Benefit:	88	Earned Income Credit:	0
Other Unreported Income:	111	Grant/Scholarship:	114
Untaxed IRA:	90	Tax Work-Study/Fellow/Assist:	113
Untaxed Pension:	100	Taxed Financial Aid:	0
Co-op Earnings:	116	Combat Pay:	115

Parent's Tax Data

Number of Family Members:	05	Marital Status:	Married
Number In College:	1	Tax Return Filed?	Filed/Comp
Number of Exemptions:	05	Tax Form:	1040
Wages, Salaries, & Tips:	153,735	Eligible For 1040A or 1040EZ?	No
Wage Income Father:	105,936	Untaxed Social Security:	0
Wage Income-Mother:	47,799	Welfare/TANF:	0
Dividend Income:	0	Child Support Received:	480
Interest Income:	652	IRA/KEOGH/SEP Deduction:	500
Bus/Farm/Rent Income:	31,755	Tax-deferred Pension/Savings:	600
Other Taxable Income:	200	Tax-deferred Med/Dep Care Pmts:	0
Itemized Deductions:	30,890	Military/Clergy Allowance:	400
Income Adjustments:	2,715	Military Allowance:	0
AGI:	183,627	Living Allowance:	0
Taxes Paid:	21,617	Tax Exempt Interest Income:	100
Education Credit:	400	Other Untaxed Income:	420
Non-Ed Vet Benefit:	410	Child Support Paid:	300
Untaxed IRA:	900	Earned Income Credit:	0
Untaxed Pension:	1,100	Tuition and fees deduction	0
Foreign Income Exclusions:	0	Grant/Scholarship:	315
Additional Child Tax Credit:	0	Tax Work-Study/Fellow/Assist:	310
IM Other Untaxed Income:	0	Combat Pay:	320
		Co-op Earnings:	325
		Family Support Income:	0

Consolidated Tax Data (batch) page

This batch page and the online page are the same except that all fields on the batch page are view only fields. Refer to the documentation about the online page for information about the fields on the batch page.

Processing Batch Verification

Access the Batch Verification page (Financial Aid, Verification, Perform Batch Verification, Batch Verification).

Batch Verification

Run Control ID: VERIF10 [Report Manager](#) [Process Monitor](#) Run

Institution:	PSUNV	Aid Year:	2010	Results
Verification Type:	Federal			
Pass/Fail Option:	Federal	Student Selection:	Both	
Source:	Tax/Verif	<input checked="" type="checkbox"/> Auto Update Target Table	<input checked="" type="checkbox"/> Set Verification Complete	
Target:	ISIR	<input checked="" type="checkbox"/> Mark Assumptions as Verified		
Application Type:		<input checked="" type="checkbox"/> Set to Send ISIR Correction		

Batch Verification page

Use the Batch Verification page to run verification for all students selected, according to the criteria that you establish.

Verification Type

Select from these values:

Federal: Select to apply federal tolerance levels to this verification.

Refer to the "Understanding Federal Variance Calculation" section earlier in this chapter.

See [Chapter 25, "Assessing Eligibility for Financial Aid," Understanding Federal Variance Calculation, page 784.](#)

Institutional: Select to apply institutional tolerance levels to this verification.

Pass/Fail Option	<p>Set the parameter for your pass or fail flag value to evaluate based on either the federal total tolerance or for any one field out of a selected tolerated amount. Values are:</p> <p><i>Federal:</i> Select to evaluate pass or fail eligibility based on Total Tolerance Federal or Total Tolerance Institutional amount set in Verification Tolerance Setup.</p> <p>Refer to the "Understanding Federal Variance Calculation" section earlier in this chapter.</p> <p>See Chapter 25, "Assessing Eligibility for Financial Aid," Understanding Federal Variance Calculation, page 784.</p> <p><i>Field:</i> Used with institutional or federal selection. Select to evaluate pass or fail eligibility based on institutional or federal field level tolerances set in the Verification Tolerance setup. Total tolerances for institutional levels are capped, while federal levels are not.</p>
Source	<p>Verification is the process of comparing source data to a target set of data. This is a translate field, and translate values should not be adjusted. Select from these values:</p> <p><i>Inst App:</i> Data from the Maintain Institutional Application tables</p> <p><i>ISIR:</i> Data from the ISIR Data Corrections tables</p> <p><i>Tax/Verif:</i> Selected data from the Application Data Verification pages created from the Consolidate routine</p>
Target	<p>This is a translate field, and translate values should not be adjusted. Select from these values:</p> <p><i>Inst App:</i> Data from the Maintain Institutional Application tables</p> <p><i>ISIR:</i> Data from the ISIR Data Corrections tables</p>
Application Type	<p>Values are valid with a source or target of <i>Inst App</i> only and include the following:</p> <p><i>Inst App:</i> Institutional application</p> <p><i>NA:</i> Need access (for 2010 and prior aid years only.)</p> <p><i>PROFILE:</i> PROFILE application</p> <p><i>FT – CSL:</i> Full-time Canadian student loan</p> <p><i>PT – CSL:</i> Part-time Canadian student loan</p>
Student Selection	<p>Select from the following values:</p> <p><i>Both:</i> Processes records with a verification status of either pending or required.</p> <p><i>Pending:</i> Processes records with a verification status of pending only.</p> <p><i>Required:</i> Processes records with a verification status of required only.</p>
Auto Update Target Table	<p>Automatically updates the target table with verified data identified with a variance.</p>

Mark Assumptions as Verified	Use this check box only when the Source value is <i>Tax/Verif</i> and the Target value is <i>ISIR</i> . Select to tag fields originally identified as Assumption fields with a field status of <i>Verified</i> . Assumed ISIR data fields that result from the federal methodology calculation are maintained on secondary pages of the ISIR Data Corrections pages.
Set to Send ISIR Correction	Select to set the Correction Status to <i>Send</i> on ISIR Corrections when the Auto Update Target Table is used.
Set Verification Complete	Select to automatically set the Verification Status to <i>Complete</i> . This field is enabled only when the Auto Update Target table is activated.

Using Batch Verification Results

Access the Batch Verification Results page (click the Results link on the Batch Verification Results page).

Batch Verification Results	
Process Instance:	
Run Date and Time:	01/08/2009 11:42:40AM
<hr/>	
Students Selected:	0
Students Processed:	0
Students Skipped:	0
Students Passed:	0
Students Failed:	0
<hr/>	

Batch Verification Results

Using Batch Verification Summary

Access the Batch Verification Summary page (Financial Aid, Verification, View Verification Summary, Batch Verification Summary).

Batch Verification Summary

Institution:

PSUNV PeopleSoft University

Aid Year:

2010 2009-2010

Find | View All

First 1 of 1 Last

Process Instance:

1769

Date/Time:

12/23/2008 1:06AM

User ID:

PS

Pass/Fail Option:

Field

☐ Mark Assumptions as Verified

☒ Auto Update Target Table

☒ Set Verification Complete

☐ Set to Send ISIR Correction

Verification Type:

Inst

Source:

Tax/Verif

Target:

Inst app

Students Selected:

3

Students Skipped:

0

Students Processed:

3

Students Passed:

0

Students Failed:

3

Batch Verification Summary page

The system displays Institution,Aid Year,Process Instance,Verification Type,Run Date and Time,Source,User ID,Target,Pass/Fail Option,Students Processed,Students Passed, and Students Failed.

Using Batch Verification Detail

Access the Batch Verification Detail page (Financial Aid, Verification, View Verification Detail, Batch Verification Detail).

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Batch Verification Detail

Laforge,Andrew **ID:** 0096

Aid Year: 2010 Financial Aid Year 2009 - 2010 **Institution:** PSUNV

Results

Pass or Fail:	Failed	Tolerance:	400	Verification Sequence:	4
Verification Status:	Not Select	Variance:	5,278	Verification Date:	12/23/2008 1:06AM
Review Status:	Complete	FED Variance:	3,174	Verification Type:	Inst

☒ **Changes Applied to Target**
☐ **Mark Assumptions as Verified**
☐ **Set to Send ISIR Correction**

Field Comparison Detail		Find First 1-20 of 20 Last				
Compared Field	Done	Source	Target	Difference	Tolerance	
12 Students AGI	<input checked="" type="checkbox"/>	8712	7195	1517	1	
14 Students Federal Taxes Paid	<input checked="" type="checkbox"/>	44	36	8	1	
16 Students Wage Income	<input checked="" type="checkbox"/>	8246	7195	1051	1	
41 Students Untax SS benefits	<input checked="" type="checkbox"/>	100	10	90	1	
43 Students Welfare/TANF	<input checked="" type="checkbox"/>	120	30	90	1	
45 Students Child Supp Received	<input checked="" type="checkbox"/>	125	40	85	1	

Batch Verification Detail page

Results

The system displays Pass or Fail, Verification Type, Verification Status, Review Status, Tolerance, Variance, FED Variance, Verification Sequence, Verification Date, Verification Type, Changes Applied to Target, Mark Assumptions as Verified, and Set to Send ISIR Correction.

Field Comparison Detail

The system displays the most recent verification results for the listed fields. Only fields that have differences appear.

The Done check box is activated when the process is run with the Auto Update Target Table option activated. Source data comes from the source table, tax/verification, ISIR, or institutional application. Target data comes from the target table, ISIR, or institutional application. There can be a difference between the source and target information. Tolerance is the tolerance level established during tolerance setup.

Verification Field Numbers

The field numbers in this table are from the reference table ISIR_VERIF_XREF. These numbers are current for the 2010 aid year.

Nbr		Field Name	Num/Char	ISIR Nbr	Profile Nbr
1		Students Number in College	N	122	7
2		Parents Number in College	N	89	57
3		Students Family Size	N	121	6
4		Parents Family Size	N	88	56
5		Students Number of Exemptions	N	38	11
6		Parents Number of Exemptions	N	101	96
7		Students Marital Status	C	16	140
8		Parents Marital Status	C	74	59
9		Students Tax Form Used	C	34	158
10		Parents Tax Form Used	C	96	160
11		Does Student Have Legal Dep	C	67	5
12		Students AGI	N	36	12

Nbr		Field Name	Num/Char	ISIR Nbr	Profile Nbr
13		Parents AGI	N	99	97
14		Students Federal Taxes Paid	N	37	13
15		Parents Federal Taxes Paid	N	100	104
16		Students Wage Income	N	39	15
17		Fathers Wage Income	N	102	106
18		Students Spouse Wage Income	N	40	16
19		Mothers Wage Income	N	103	107
27		Student Eligible for 1040A-EZ	C	35	0
28		Parent Eligible for 1040A-EZ	C	97	0
29		Tax Return Filed by Student?	C	33	161
30		Tax Return Filed by Parent?	C	95	166
41		Students Untax SS benefits	N	0	18
42		Parents Untax SS benefits	N	0	108
43		Students Welfare/TANF	N	0	19
44		Parents Welfare/TANF	N	0	109
45		Students Child Supp Received	N	53	20
46		Parents Child Supp Received	N	114	110
47		Students Other Untaxed Income	N	59	21

Nbr		Field Name	Num/Char	ISIR Nbr	Profile Nbr
48		Parents Other Untaxed income	N	120	113
49		Students EIC	N	0	22
50		Parents EIC	N	0	116
51		Parents Adjustment to Income	N	0	103
52		Students Interest/dividends	N	0	17
53		Parents Interest Income	N	0	99
54		Parents Dividend Income	N	0	100
55		Parents Business/farm Income	N	0	101
56		Student Child Support Paid	N	47	40
57		Parent Child Support Paid	N	108	61
58		Parent IRA/KEOGH/SEP Deduct	N	113	111
59		Parents Pretax Pension/savings	N	112	117
60		Parents Pretax Med/dep Care	N	0	65
61		Parent Military/Clergy Allow	N	118	114
62		Parent Exempt Interest Income	N	115	118
63		Parents Foreign Inc Exclusion	N	0	112
64		Students Itemized Deduction	N	0	14
65		Parents Itemized Deduction	N	0	105

Nbr		Field Name	Num/Char	ISIR Nbr	Profile Nbr
66		Parents Other Taxable Income	N	0	102
67		Parents Wages, Salaries, Tips	N	0	98
68		Parents Tuition Fees Deduction	N	0	149
69		Student Education Credit	N	46	131
70		Parent Education Credit	N	107	132
71		Student IRA/KEOGH/SEP Deduct	N	52	0
72		Student Exempt Interest Income	N	54	0
73		Student Non-Edu Vet Benefit	N	58	0
74		Parent Non-Edu Vet Benefit	N	119	0
75		Student Other Unreport Income	N	60	0
77		Student Pretax Savings	N	51	0
78		Student Untax IRA	N	55	0
79		Parent Untax IRA	N	116	0
80		Student Untax Pension	N	56	0
81		Parent Untax Pension	N	117	0
82		Student Military/Clergy Allow	N	57	0
83		Student Combat Pay	N	50	182
84		Parent Combat Pay	N	111	189

<i>Nbr</i>		<i>Field Name</i>	<i>Num/Char</i>	<i>ISIR Nbr</i>	<i>Profile Nbr</i>
85		Student Taxable Work-Study	N	48	0
86		Parent Taxable Work-Study	N	109	0
87		Student Grant/Scholarship	N	49	0
88		Parent Grant/Scholarship	N	110	0
89		Student Taxed Financial Aid	N	0	23
90		Student Co-Op Earnings	N	49	0
91		Parent Co-Op Earnings	N	111	0
92		Parent Addl Child Tax Credit	N	0	203
93		Parent Living Allowance	N	0	114
94		Parent IM Other Untax Income	N	0	205
95		Parent Family Support Income	N	0	206
96		Parent Military Allowance	N	0	204

Using NSLDS Data and Processes

This section provides an overview of NSLDS data and processes and discusses how to:

- Process TSM or FAH requests.
- Use FA inbound.
- Run NSLDS Financial Aid Transcript (FAT) load.
- Load program rules.
- Use NSLDS suspense management.
- Create reports listing NSLDS FAT load errors.

- Generate NSLDS alert file reports.
- Use NSLDS change review.
- Process NSLDS alert file information.
- Review NSLDS general aggregate information.
- View details of NSLDS aggregate data
- View NSLDS Pell information.
- View NSLDS Academic Competitiveness Grant (ACG) details.
- View NSLDS National SMART grant (NSG) details.
- View NSLDS TEACH grant details.
- View NSLDS additional information.
- Use NSLDS Data in the Packaging Process

Understanding NSLDS Data and Processes

The National Student Loan Data System (NSLDS) is a central database operated by the Department of Education to track student aid information. The NSLDS database is updated with information from schools, agencies that guaranty loans, the Direct Loan program, the Pell Grant program and other Department of Education programs. Schools use the NSLDS data to determine aid eligibility based on past and current awards.

Data from the NSLDS can be sent to schools in the following ways:

- School submits a Financial Aid History (FAH) request.
- School submits a Transfer Student Monitoring (TSM) Alert request.
- Limited NSLDS data is also part of the Institutional Student Information Record (ISIR).

Oracle provides a process to create the TSM/FAH Inform (request) file to send to the NSLDS. Additionally, once a TSM/FAH file is received, options are available to load/manage the NSLDS data through use of staging tables, processes and reports.

You can view loaded NSLDS data by using the NSLDS Inquiry components, which match the NSLDS file structure.

To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

Pages Used to Review and Process NSLDS Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NSLDS Request	SFA_RUN_NSLDS_OUT	Financial Aid, File Management, NSLDS, Process NSLDS Request, NSLDS Request	Either generate a TSM or FAH Inform request file or a file with combined TSM and FAH requests.
FA Inbound	RUNCTL_FAT_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load the NSLDS Alert and FA History files into the NSLDS staging tables.
NSLDS Transfer Alert File Load	RUNCTL_FAPTALRT	Financial Aid, File Management, NSLDS, Process NSLDS Files, NSLDS Transfer Alert File Load	Run the Load NSLDS Transfer Alert File (FAPTALRT) process to load both Alert and Financial Aid History files from the staging table.
NSLDS Suspense Management	NSLDS_SUSP_CNTRL	Financial Aid, File Management, NSLDS, Manage NSLDS Records, NSLDS Suspense Management	View NSLDS records that have been loaded into the staging tables by the FA Inbound process. Review NSLDS records that have an error load status.
NSLDS FAT Load Error Report	RUNCTL_FA921	Financial Aid, File Management, NSLDS, NSLDS FAT Load Error Report	Run a query and create a Crystal report listing all NSLDS records that did not load correctly into the staging tables and were assigned an error load status.
NSLDS Alert File Report	RUNCTL_FA924	Financial Aid, File Management, NSLDS, NSLDS Alert File Report	Generate a printed copy of students reported on the NSLDS Alert file as having changed data. Review before disbursing federal aid.
NSLDS Change Review	NSLDS_CHANGE_RVW	Financial Aid, File Management, NSLDS, Review NSLDS Flagged Students, NSLDS Change Review	Review all NSLDS Alert file records that have been loaded into the NSLDS Inquiry application tables. After student NSLDS information has been reviewed, use this page to indicate that you have reviewed and resolved any student aid eligibility discrepancies.

Page Name	Definition Name	Navigation	Usage
NSLDS Information	NSLDS_GEN_AGGR	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Information	View error codes, change flags, MPN flags, and alert file flags.
NSLDS Overpayment Information	NSLDS_CONTCT_SEC	Click the Overpayment Information link on the NSLDS Information page.	View loan overpayment and contact information for Pell, Perkins, SEOG, ACG, and NSG.
NSLDS Detail	NSLDS_ERR_CD_SEC	Click the Detail link on the NSLDS Information page.	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.
NSLDS Loan Detail	NSLDS_LOAN_DTL	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Loan Detail	Review detailed information for every federal loan that the student has received.
NSLDS Pell	NSLDS_PELL	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Pell	Review a summary of a student's last three Pell awards.
NSLDS ACG	NSLDS_ACG	Financial Aid, Awards, View NSLDS Loan Data, NSLDS ACG	View details for Academic Competitiveness Grants.
NSLDS NSG	NSLDS_NSOG	Financial Aid, Awards, View NSLDS Loan Data, NSLDS NSG	View details for National SMART Grants.
NSLDS TEACH	NSLDS_TEACH	Financial Aid, Awards, View NSLDS Loan Data, NSLDS TEACH	View details for TEACH Grants.
NSLDS Additional Information	NSLDS_ADDDL_INFO	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Additional Information	Review overpayment information or name history.
NSLDS Activity	NSLDS_ERR_CD_SEC	Financial Aid, Awards, View NSLDS Loan Data. Click the Detail link on any page in the component.	View NSLDS activity and change flags.
NSLDS Data Push	SFA_RUN_NSLDS_UPDT	Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS, NSLDS Data Push	Run the Update Aggregates with NSLDS as an independent process to push NSLDS totals into the aggregate aid tables to be used by the Packaging process.

Processing TSM or FAH Requests

Access the NSLDS Request page (Financial Aid, File Management, NSLDS, Process NSLDS Request, NSLDS Request).

NSLDS Request

Run Control ID: PS

Report Manager

Process Monitor

Run

Parameters

Institution

PSUNV

*Aid Year

2008

School Code

Population Selection

All students

Students in list

Use Query

Request Type

Financial Aid History only

Transfer Monitoring only

Both FAH and TM

File Path

Enrollment Date

00000000

Monitor Begin Date

00000000

List of IDs

ID

Request Type

Enrollment Date

Monitor Begin Date

Delete from TMA

0059

FAH only

0060

FAH only

0056

TM only

NSLDS Request page

Use this page to generate a TSM or FAH Inform request or to create a file that combines both TSM and FAH request data.

Note. You must establish a School Transfer Profile on the NSLDS FAP website for NSLDS to accept and process the Transfer Monitoring Batch Inform file created here.

Population Selection

All Students

Select to request a Financial Aid History file for all students active in the given aid year.

Students in List

Select to view the List of IDs group box.

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Use Query

Select Use Query to activate the Select Query button for accessing the standard Select Query lookup page. Oracle recommends that you enter the full or partial query name for a faster search of the database. Because the Batch Inform File requires certain fields in a particular order, only queries that return the required fields can be used here.

Use the delivered baseline query (SFA_NSLDSREQ_ALL) to create a population of students, making any changes to the query as required. Or you can define your own query using PeopleSoft Query Manager using SFA_NSLDSREQ_ALL as a model or template. The Enrollment Date and Monitor Begin Date values are entered on the run control page and is, therefore, the same for all students selected by the query.

Request Type

Request type options are not available if All students is selected for Population Selection.

Financial Aid History only

Select to request a financial aid history file.

Transfer Monitoring only

Select to request to add or remove students from Transfer Monitoring.

Both FAH and TM

Use to request a financial aid history file and/or transfer monitoring addition/deletion. If the Population Selection is *Students*, you can set the request type for each student in the list.

Parameters**File Path**

Enter the file path and directory name where the file should be written, for example C:\TEMP\. The batch files are sequentially named TRNINFnn from 01 through 99 for each submittal date (current date).

Enrollment Date

Enter the begin date for the period of enrollment. This date can be a future date, but not more than 18 months greater than the current date. Also, it cannot be more than 90 days less than the current date. The default value is all zeros if Request Type is Financial Aid History only.

Monitor Begin Date

Enter the date when monitoring should begin. This date can be a future date, but not greater than the enrollment date. If the enrollment date has already passed, the submittal date (current date) is the default.

List of IDs

This group box appears when Students in List is selected for Population Selection. Use the + (plus) sign to enter a row for each student.

ID

Select a student ID from the list. The Request Type list appears.

Request Type	The Request Type default value appears when the student ID is selected. If the Type is <i>Both</i> , you can subsequently set the Request Type on the grid. The remaining fields on the grid are available only if the Request Type is either <i>TM only</i> or <i>Both</i> .
Enrollment Date	Available when the request type is either <i>Transfer Monitoring only</i> or <i>Both FAH and TM</i> . Required when the Students in List is selected and the Request Type is not Financial Aid History only.
Monitor Begin Date	Available when the Request Type is either <i>Transfer Monitoring only</i> or <i>Both FAH and TM</i> . Required when the Students in List is selected and the request type is not Financial Aid History only.
Delete from TMA	Select to remove a particular student from monitoring.
See Also	

Chapter 15, "Setting Up Disbursement Rules," Defining Item Type Disbursement Rules, page 453

Using FA Inbound

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files, FA Inbound).

FA Inbound

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Run Option:

☒ Single File ☐ File List

Inbound File:

ISIR TG Number:

FA Inbound page

Use the FA Inbound page to load NSLDS Alert and NSLDS Financial Aid History files into the NSLDS staging tables.

Run Option	Select Single File to enter a single file location or File List to indicate a list of files in the Inbound File field.
Inbound File	Enter the name and location of the NSLDS Alert file that you want to load into the staging tables. Be sure that the server has read access rights to the location of the file.

ISIR TG Number

Assign the ISIR TG number for the ISIRs that are loaded. When processing a file list, the system assigns the same TG number to all ISIRs in the list.

Running NSLDS FAT Load

Access the NSLDS Transfer Alert File Load page (Financial Aid, File Management, NSLDS, Process NSLDS Files, NSLDS Transfer Alert File Load).

NSLDS Transfer Alert File Load

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

☐ Push NSLDS to Aggregates

☒ Insert FA User Edit Message

Aid Year:

2008

Financial Aid Year 2007 - 2008

Institution:

PSUNV

PeopleSoft University

Edit Message Type:

Informtnl

Edit Message Code:

NSLDS1

Term:

0607

NSLDS Transfer Alert File Load page

Use this page to run the FAPTALRT process to load both Transfer Alert and Financial Aid History files.

Note. You must create user edit messages to support this process.

Push NSLDS to Aggregates	Select to have the process push NSLDS aggregate data into the packaging aggregate tables. NSLDS programs defined on the Aggregate Area-NSLDS Cross-reference setup page are evaluated.
	Note. If you choose not to push aggregate aid totals, an independent push routine is available. If you choose to push aggregate aid totals, you must define aggregate area translation for the NSLDS Data Push process, which is discussed later in this chapter.
Insert FA User Edit Message	Select to have the load process insert a user edit message for the student.

User Edit Message

When you select the Insert FA User Edit Message check box, the system displays these additional fields.

Aid Year	The valid aid year for the current Transfer Monitoring process.
Institution	Select the institution for which you want to enter a user edit message.
Edit Message Type	Select <i>Error</i> , <i>Informtinal</i> (informational), or <i>Warning</i> .
Edit Message Code	Select the edit message code to be entered for the student. The available codes are restricted based on the type of edit message that you specify.
Term	Select the term for which the user edit message is to become active.

See Also

Chapter 15, "Setting Up Disbursement Rules," Defining Item Type Disbursement Rules, page 453

Loading Program Rules

The load program selects all NSLDS records with a load status of *Not Processed* and *Error*. The program attempts to match each selected NSLDS transcript record with a student in the database by matching the SSN, last name, and birth date on the NSLDS record with the same fields on the PeopleSoft Enterprise Campus Community pages. If a matching record is found, the NSLDS data loads into the application tables, the NSLDS record load status is set to *Processed* and the record can be viewed in the NSLDS Inquiry component.

The loaded NSLDS information updates the student's NSLDS Status field on the Packaging Status Summary page. If a student has previously been reported in default or owes an overpayment, the status is reset to eligible if the NSLDS information confirms the status. A current status of eligible is also reset to default and/or overpayment if the NSLDS data confirms the new status.

If a matching SSN cannot be found in the database, the NSLDS record load status is set to *Error* and the error message on the Suspense Management page is *Student not found*. To load the NSLDS record, update the student's SSN in the Campus Community components so that the SSNs match, and then rerun the program.

If the NSLDS record is older than the current NSLDS information on the application, then the NSLDS record load status is set to *Error* and the error message on the Suspense Management page is *EFFDT Conflict*. This error can occur when a recent ISIR is loaded before processing the NSLDS FAT file, and it cannot be corrected.

Using NSLDS Suspense Management

Access the NSLDS Suspense Management page (Financial Aid, File Management, NSLDS, Manage NSLDS Records, NSLDS Suspense Management).

NSLDS Suspense Management			
EC Transaction ID:	TRALRTOP	EC Queue Instance:	2
		NSLDS Header Nbr:	1
Social Security #:	079-58-8865	Pell Change Flag:	Y
Last Name:	BAKER	Loan Change Flag:	N
First Name:	NIKKI	Aggregate Change Flag:	N
ID:		ACG Change Flag:	Y
NSLDS Date of Birth:	09/14/1981	NSG Change Flag:	N
Inform Last Name:	BAKER	TEACH Change Flag:	N
Inform First Name:	NIKKI	Load Status <input checked="" type="radio"/> Not Processed <input type="radio"/> Processed <input type="radio"/> Error <input type="radio"/> Skip	
Inform Date of Birth:	19810914		

NSLDS Suspense Management page

The system displays the EC Transaction ID (electronic commerce transaction ID), EC Queue Instance and NSLDS Header Nbr (National Student Loan Data System header number).

Social Security #	Displays student's SSN maintained by the NSLDS and reported in the NSLDS Alert file.
Last Name	Displays student's last name maintained by the NSLDS and reported in the NSLDS Alert file.
First Name	Displays student's first name maintained by the NSLDS and reported in the NSLDS Alert file.
EmplID	Displays the unique student identification number assigned by the NSLDS Load program.
NSLDS Date of Birth	Displays student's birth date maintained by the NSLDS and reported in the NSLDS Alert file.
Inform Last Name	Displays last name reported by the institution in the inform file or online. This information is reported to the school in the NSLDS Alert file.
Inform First Name	Displays first name reported by the institution in the inform file or online. This information is reported to the school in the NSLDS Alert file.
Inform Date of Birth	Displays date of birth reported by the institution in the inform file or online. This information is reported to the school in the NSLDS Alert file.
Pell Change Flag	Indicates whether information changed in the alert file, <i>N</i> : No or <i>Y</i> : Yes.

Loan Change Flag	Indicates whether information changed in the alert file, <i>N</i> : No or <i>Y</i> : Yes.
Aggregate Change Flag	Indicates whether information changed in the alert file, <i>N</i> : No or <i>Y</i> : Yes.
ACG Change Flag (Academic Competitiveness Grant change flag)	Indicates whether ACG has changed.
NSG Change Flag (National SMART Grant change flag)	Indicates whether NSG has changed.
TEACH Change Flag	Indicates any change to TEACH grant information for one or more grants. Values are <i>Y</i> (yes) or <i>N</i> (no). For FAH records, the field is blank.
Load Status	<p>The system displays one of these values:</p> <p><i>Not Processed</i>: The default setting after the alert file is loaded into the staging tables.</p> <p><i>Processed</i>: The NSLDS FAT Load process sets this value if the record is successfully loaded into the application tables.</p> <p><i>Skip</i>: The user manually sets this value to prevent the record from being processed.</p> <p><i>Error</i>: If the NSLDS FAT Load program cannot load the record into the application tables, an accompanying error message appears describing the error:</p> <ul style="list-style-type: none"> • <i>EFFDT Conflict</i>: The data attempting to load is older than the current NSLDS data in the application tables. • <i>Multiple Matches</i>: Multiple IDs exist with the same last name, birthdate, and SSN (National ID). • <i>Student Not Found</i>: No record was found with a matching last name, birthdate, and SSN (National ID).

Creating Reports Listing NSLDS FAT Load Errors

Access the NSLDS FAT Load Error Report page (Financial Aid, File Management, NSLDS, NSLDS FAT Load Error Report).

NSLDS FAT Load Error Report

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

NSLDS FAT Load Error Report page

This report has no run control options. The error reason appears on the report. To prevent records identified on the report from loading, set the load status to a value of *Skip* on the NSLDS Suspense Management page.

Click the Run button to run this request. Process Scheduler runs the NSLDS FAT Load Errors (FA921), a Crystal process, at user-defined intervals.

Generating NSLDS Alert File Reports

Access the NSLDS Alert File Report page (Financial Aid, File Management, NSLDS, NSLDS Alert File Report).

NSLDS Alert File Report

Run Control ID: AUDITS

[Report Manager](#) [Process Monitor](#)

Run

Report Parameters

*Institution:

PSUNV

*Aid Year:

2008

NSLDS Alert File Report page

Use the NSLDS Alert File Report page to generate a report that lists the change flags for NSLDS information. This report identifies students who need to be reviewed before you can disburse federal funds to them. The contents of the report match the records displayed in the NSLDS Change Review page. The system removes the records from the report when they are marked as reviewed on this page.

Select the institution and aid year to control which set of student award data the system prints on the report.

Using NSLDS Change Review

Access the NSLDS Change Review page (Financial Aid, File Management, NSLDS, Review NSLDS Flagged Students, NSLDS Change Review page).

NSLDS Change Review

Customize | Find |

1 of 1

Reviewed	Queue Inst	ID	Name	Pell Change	ACG Change	NSG Change	TEACH Change	Loan Change	Aggregate Change			
<input type="checkbox"/>	1	FA0273	Baker,Nikki	Y	Y	N	N	N	N	Awards	Loans	NSLDS

NSLDS Change Review page

Students with changed NSLDS information are listed on the page. The financial aid staff reviews each file for possible modifications to the current financial aid eligibility. After the file is reviewed and the staff person selects the Reviewed check box, the system removes the student's information from the page. The Change flag fields indicate what portion of the student's NSLDS data was recently modified by NSLDS.

Reviewed	Select to indicate that you reviewed the changes to the student's NSLDS information and completed any modifications to the student's current financial aid eligibility.
Queue Inst (queue instance)	Indicates when the record was loaded. The system generates a unique sequential queue instance number for each Transfer Alert file loaded. A greater value indicates a more recently loaded file.
ID	Unique student identification number.
Name	Student's name.
Pell Change	Indicates whether a change to the student's Pell Grant history has occurred. Values are <i>Y</i> : Yes or <i>N</i> : No.
ACG Change	Indicates whether a change to ACG has occurred.
NSG Change	Indicates whether a change to NSG has occurred.
TEACH Change	Indicates whether a change to TEACH grants has occurred.
Loan Change	Indicates whether a change to the student's loan history has occurred. Values are <i>Y</i> : Yes or <i>N</i> : No.
Aggregate Change	Indicates whether a change to the student's aggregate loan history has occurred. Values are <i>Y</i> : Yes or <i>N</i> : No.
Awards	Click this link to access the Award Summary and Award Term Summary pages, which remain the same.
Loans	Click this link to access the Origination Student Summary page, which remains the same.
NSLDS	Click this link to access the NSLDS Information page, which remains the same.

Processing NSLDS Alert File Information

The following steps describe how you can best implement the NSLDS Transfer Monitoring process using the applications provided. Each institution, however, should implement the Transfer Monitoring process based on their specific business requirements.

To run the Transfer Monitoring process:

1. Contact NSLDS to establish your transfer monitoring profile and to choose to receive the Transfer Monitoring Alert batch file to load the students' updated NSLDS information into the database.

2. Inform NSLDS of the transfer students that you want to have monitored on or before the students' enrollment begin date, either online at www.NSLDSFAP.ed.gov or using the NSLDS Request process.

Note. Institutions may want to assign a checklist, service indicator, or financial aid user edit message to ensure that disbursements are suspended until the monitoring process is completed.

3. Receive an Alert file and load into the database.
 - a. Use the FA Inbound page to load the Alert file into electronic data interchange (EDI) staging tables. You can view EDI load results on the ISIR File Review page.
 - b. Run the NSLDS FAT Load process to load the data into the application tables. View the data in the NSLDS Inquiry component.

Note. You can have the load program assign a new financial aid user edit message code that can be used to suspend the authorization and disbursement of funds for a specific term.

4. Review and resolve various load error messages.

The NSLDS FAT load process uses the last name, date of birth, and SSN to find the student in the database. The system assigns an error load status with an error reason code displayed on the NSLDS Suspend Management page for records that cannot be loaded.

Run the NSLDS FAT Load Errors report for a list of failed records. Resolve load errors as follows:

- **EFFDT (effective date) Conflict.** This error occurs when the NSLDS alert file date is older than the current NSLDS data in the database. These records should not be loaded. Set the load status to *Skip*.
- **Multiple Matches.** More than one record in the database has the same last name, SSN, and date of birth. Delete or modify the inappropriate record and rerun the load program.
- **Student Not Found.** Use the Search Match page or the Demographic and Address Data component to search for the student using the name, SSN, and date of birth data provided on the NSLDS Suspend Management page. Correct the student's bio-demo data to match the NSLDS data for the student and rerun the load program.

5. Review Alert file records for possible changes in financial aid eligibility.

Students reported on the NSLDS Alert file have had a change to their financial aid history since the last time an ISIR was submitted to the school. You must review these records before federal aid can be disbursed to the student. Use the NSLDS Change Review page to track these students. Based on the change information reported by the NSLDS, review and modify the student's awards, originated loans, and aggregate data as needed.

After you review the student's eligibility, indicate on the page that the record was reviewed. The system then removes the record. If a checklist, service indicator, or user edit message was used to suspend disbursement of financial aid, update the appropriate communication record at this time. You can use the NSLDS Alert File report to generate a printed list of the records listed in the NSLDS Change Review page.






See Also

Chapter 15, "Setting Up Disbursement Rules," Defining Basic Global Rules for Authorization, page 449

National Student Loan Data System, Transfer Student Monitoring/Financial Aid History Processes and Batch File Layouts (Usually published in October or November.)

Reviewing NSLDS General Aggregate Information

Access the NSLDS Information page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Information).

NSLDS Information					NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS TEACH	
Johnny Page					0062					  
Last Updated: 11/03/2009		Last Effseq: 0		NSLDS Transaction Nbr:						
SSN: 609-05-0020		NSLDS Transaction Source: Alert File			Overpayment Information					
NSLDS Post-Screening Code(s):										
Aggregate Data Find View All First  1 of 1  Last										
Eff Date: 11/03/2009		Seq: 0		NSLDS Txn Nbr:		NSLDS Transaction Source:		Alert File Detail		
Transaction										
Process Date: 11/03/2009										
Discharged Loan: None		Active Bankruptcy: Y		Fraud Flag:		Y				
Default Loan: Y		Satisfactory Repayment: Y		TEACH Grant Loan Conv:		Y				
UGRD & GRAD Amounts										
	Subsidized	Unsubsidized	Unallocated	Combined						
Principal Balance:	\$2500	\$4500	\$6500	\$13500						
Pending Disbt:	\$8500	\$10500		\$19000						
Total:	\$11000	\$15000	\$6500	\$32500						
Undergraduate Amounts										
Award Year: 2009		Dependency: I								
	Subsidized	Unsubsidized	Unallocated	Combined						
Principal Balance:	\$1500	\$2500	\$3500	\$7500						
Pending Disbt:	\$4500	\$5500		\$10000						
Total:	\$6000	\$8000	\$3500	\$17500						

NSLDS Information page (1 of 2)

Graduate Amounts				
Award Year:	2009	Dependency:		
	Subsidized	Unsubsidized	Unallocated	Combined
Principal Balance:	\$1000	\$2000	\$3000	\$6000
Pending Disbt:	\$4000	\$5000		\$9000
Total:	\$5000	\$7000	\$3000	\$15000
Other Aggregates				
Perkins Principal Balance:	\$1000	Perkins Current Year Loan Amount:	\$6000	
PLUS Outstanding Balance:	\$2000	PLUS Total:	\$7000	
Grad PLUS Outstanding Balance:	\$3000	Grad PLUS Total:	\$8000	
Consolidation Outstanding Balance:	\$0	Consolidation Total:	\$0	
TEACH Loan Principal Balance:	\$5000	TEACH Loan Total:	\$10000	

NSLDS Information page (1 of 2)

If you chose to push aggregate totals to the aggregate aid tables for direct use by the Packaging and Awarding process, the subsidized and unsubsidized aggregate totals under the UGRD and GRAD Amounts section and Perkins principal balance are pushed to the corresponding aggregate areas for this student.

Overpayment Information

Click this link to access NSLDS overpayment details The link appears when federal overpayment information exists.

Aggregate Data

Eff Date (effective date) Displays the effective date of the loaded aggregate information. Aggregate data is the loan history. There can be a date for an ISIR and multiple sequences. You can view loans that are in default, discharged loans, or active bankruptcies.

NSLDS Txn Nbr (NSLDS transaction number) Displays the transaction number of the NSLDS data from the NSLDS. As the student's financial aid history is updated by the NSLDS, the transaction number moves upward one increment. If new NSLDS information is received by a school that has a lower transaction number than the current data, the new information does not load. The system assumes that the current information is more recent.

NSLDS Transaction Source Displays the source of the loaded NSLDS information. Values are: *ISIR*, *Alert* (NSLDS Transfer Alert file), and *FA History*.

Transaction

Process Date Displays the process date for the transaction. If the data source is the ISIR, this date is the CPS process date of the ISIR. If the data source is the NSLDS FAT file, the date used is the NSLDS file process date.

Discharged	Indicates whether a student's defaulted loan has been discharged. The values for the field are <i>Y</i> (yes) or <i>N</i> (no).
Default	Displays whether the transaction is in default.
Active Bankruptcy (active bankruptcy)	Displays whether the loan is part of an active bankruptcy proceeding.
Satisfactory Repayment (satisfactory repayment)	Indicates whether the loan has been repaid satisfactorily.
Fraud	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
TEACH Grant Loan Conv	Indicates whether a TEACH Grant has been converted to a loan on one or more grant records.

UGRD/GRAD

This section displays combined amounts for undergraduate and graduate loans.

Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.

Undergraduate Amounts

This section displays amounts for undergraduate loans.

Award Year	Displays the Award Year used in the student's undergraduate loan limits determination.
Dependency	Displays the Dependency status used in the student's undergraduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.

Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
---	--

Graduate Amounts

This section displays amounts for graduate loans.

Award Year	Displays the Award Year used in the student's graduate loan limits determination.
Dependency	Displays the Dependency status used in the student's graduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.

Other

Perkins Principal Balance	Displays Perkins loans outstanding principal balance.
PLUS Outstanding Balance	Displays the aggregate loan outstanding principal balance amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Outstanding Balance	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
Consolidation Outstanding Balance	Displays the outstanding principal balance for all FFELP consolidation loans.
TEACH Loan Principal Balance	Displays the outstanding principal balance for TEACH unsubsidized loan type (D8).
Perkins Current Year Loan Amount	Displays the total Perkins loan disbursements for the award year (July-June).
PLUS Total	Displays the aggregate loan total amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Total	Displays the total loan amount of graduate PLUS loans borrowed by the student.
Consolidation Total	Displays the total of all FFELP consolidation loans.

TEACH Loan Total Displays the total of Aggregate TEACH unsubsidized loan outstanding principal balance.

Viewing NSLDS Overpayment Information

Access the NSLDS Overpayment Information page (click the Overpayment Information link on the NSLDS Information page).

NSLDS Overpayment Information			
Contact Information			
Pell Overpay:	N	Pell Overpayment Contact:	N/A
Perk Overpay:	N	Perkins Overpayment Contact:	N/A
SEOG Overpay:	W	SEOG Overpayment Contact:	N/A
ACG Overpay:	N	ACG Overpayment Contact:	N/A
NSG Overpay:	N	NSG Overpayment Contact:	N/A
TEACH Overpay:		TEACH Overpayment Contact:	

NSLDS Overpayment Information page

The system displays any overpayments for the following:

- Pell Overpy (Pell overpayment)
- Perk Overpy (Perkins overpayment)
- SEOG Ovrpy (SEOG overpayment)
- ACG Ovrpy (ACG overpayment)
- NSG Overpy (NSG overpayment)
- TEACH Overpay (TEACH overpayment)

The values for overpayment are:

- *F*: Fraud designated through an overpayment.
- *Y*: An active overpayment exists.
- *S*: The student has an overpayment, but has made satisfactory arrangements for repayment.
- *N*: Not applicable.
- *D*: Deferred.
- *W*: Waived.

The Pymnt Contct (payment contact) fields refer to the contact agency for the overpayment. The federal ID appears if an overpayment is present.

Viewing Details of NSLDS Aggregate Data

Access the NSLDS Detail page (click the Detail link on the NSLDS Information page).

NSLDS Activity			
NSLDS Additional Pell:		NSLDS Additional Loans:	
Additional ACG:		Additional NSG:	
Additional TEACH Grant:			
NSLDS Active Match:			

Change Flags			
NSLDS Default Ln Chg:		NSLDS Overpymnt Chg:	
NSLDS Dschrgd Ln Chg:		NSLDS Aggr Loan Chg:	
NSLDS Satsfctry Rpymnt Chg:		NSLDS Perkins Chg:	
NSLDS Actv Bnkruptcy Chg:		NSLDS Pell Pymnt Chg:	
NSLDS Fraud Loan Chg:		NSLDS TEACH Grant to Loan Chg:	
NSLDS TEACH Grant Aggr Chg:	N	NSLDS TEACH Loan Aggr Chg:	N

Loan Limit Flags			
NSLDS Grad Sub Loan Limit:	E	Exceeded Limit	
NSLDS UG Sub Loan Limit:	C	Close to Limit	
NSLDS Grad Combo Loan Limit:	C	Close to Limit	
NSLDS UG Combo Loan Limit:	E	Exceeded Limit	

MPN Flags			
DL Staff Master-Prom Note Flag:	N	No MPN on file	
DL Plus Master-Prom Note Flag:	N	No MPN on file	
DL Grad PLUS MPN Flag:	A	Active	

NSLDS Alert File Flags			
Aggregate Change Flag:	N	Loan Change Flag:	N
ACG Payment Change:	Y	NSLDS NSG Change:	N
Pell Change Flag:	Y	TEACH Grant Change Flag:	N

NSLDS Detail page

The system displays NSLDS change flags, loan limit flags, MPN flags, and NSLDS Alert file flags:

- The NSLDS Activity group box displays data from the ISIR record that indicates if more than three rows exist in NSLDS for the respective area.
- The Change Flags group box indicates changes that have occurred to the respective area on the student's NSLDS record.

- The Loan Limit Flags group box indicates the condition of various loan aggregates. Possible values are *E: Exceeded Loan Limit*, *C: Close to Limit*, *N: No Problem*.
- The MPN Flags group box indicates the promissory note status for various Direct Lending loans.
- The NSLDS Alert File Flags group box fields indicate when a change has been reported that might affect the student's eligibility. These data elements come from the TSM and ISIR records.

Viewing NSLDS Loan Details

Access the NSLDS Loan Detail page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Loan Detail).

NSLDS Information		NSLDS Loan Detail		NSLDS Pell		NSLDS ACG		NSLDS NSG		NSLDS TEACH	
Nikki Baker						FA0273					
SSN: 079-58-8865		NSLDS DOB: 09/14/1981		Last Updated: 12/13/2008		Last Effseq: 0					
Aggregate Data Find View All First <input type="button" value="1 of 4"/> Last											
Eff Date: 12/13/2008		Seq: 0		NSLDS Txn Nbr:		NSLDS Transaction Source:		Alert File		Detail	
Loan Detail Find View All First <input type="button" value="1 of 6"/> Last											
NSLDS Ln Seq: 1		Loan Year: 4th Year		NSLDS Contact: 700043							
NSLDS Loan Type: CL Consolidated Loan		Contact Type: Disability									
NSLDS Status Code: ID In School or Grace		Stat EFFDT: 11/10/2002									
Guarantor: 800 USA Funds		NSLDS Loan Type Cd:									
Award ID:											
Prin Bal: \$10875		Net Disb: \$10750		Balance Dt: 11/10/2002							
Loan Start: 09/10/2001		Loan End: 05/28/2002		Grade Level:							
Orig Schl: 00132800 UNIVERSITY OF SOUTHERN CALIFOR		Capitalize Int: N									
Extra Unsub Ind: Neither		Perkins Cancellation Type:									
Guarantee/Approved Amount: 10500		Total Disbursement Amount: \$10875									
Guarantee/Approval Date: 06/15/2001		NSLDS Lender Servicer: N/A									
Last Loan Disbursement Date: 03/15/2002		NSLDS Lender Code: N/A									
Last Loan Disbursement Amount: \$532		Loan Change Flag: N									
Subsidized Aggregate Amount: 5875		Combo Aggregate Amount: 10875									
Unsubsidized Aggregate Amt: 5000		Unallocated Aggregate Amt: 452									

NSLDS Loan Detail page

The system displays the student's name and ID, SSN, NSLDS DOB, Last Updated, Last Effseq, Eff Date (effective date), Seq (sequence), NSLDS Txn Nbr (NSLDS transaction number), and NSLDS Txn Src (NSLDS transaction source).

Loan Detail

In the Loan Detail group box, the system displays NSLDS Ln Seq (NSLDS loan sequence), Loan Year, NSLDS Contact, NSLDS Type, Contact Type, NSLDS Status, Stat EFFDT (status effective date), Guarantor, and NSLDS Ln TypCd (NSLDS loan type code). The system displays Prin Bal (principal balance), Net Disb (net disbursed), Balance Dt (balance date), Loan Start and Loan End, Orig Schl (original school), and Grade Level.

Award ID	Displays the Award ID provided by COD. The Award ID identifies the TEACH loan (D8 Loan Type Code) that was converted from a grant.
Grade Level	Displays NSLDS grade level for the student in this loan year.
Perkins Cancellation Type	Indicates the cancellation status of the Perkins loan. Values are: <i>DT</i> : Defense Teacher <i>PB</i> : Perkins Bankruptcy <i>PD</i> : Perkins Death <i>PE</i> : Perkins Early Intervention <i>PI</i> : Perkins Disability <i>PL</i> : Perkins Law Enforcement <i>PM</i> : Perkins Military Service <i>PN</i> : Perkins Nurse/Medical Technician <i>PS</i> : Perkins Subject Matter Area <i>PT</i> : Perkins Teacher Service <i>PV</i> : Perkins Volunteer <i>N/A</i> : Not Applicable
Guarantee/Approved Amount	Displays approved amount for the loan.
Guarantee/Approved Date	Displays date of the loan approval.
Subsidized Aggregate Amount	Displays FFEL consolidation loan subsidized aggregate amount, the amount included in the subsidized aggregate calculation. The system populates this value only if the loan type is CL.
Unsubsidized Aggregate Amt	Displays FFEL consolidation loan unsubsidized aggregate amount, the amount included in the unsubsidized aggregate calculation. The system populates this value only if the loan type is CL.
Combo Aggregate Amount	Displays FFEL consolidation loan combined aggregate amount, the amount included in the combined aggregate calculation, which can include HEAL. The system populates this value only if the loan type is CL.

Unallocated Aggregate Amt Displays FFEL consolidation loan unallocated aggregate amount, the amount that could not be determined to be subsidized, unsubsidized, or Perkins. The system populates this value only if the loan type is CL.

Viewing NSLDS Pell Information

Access the NSLDS Pell page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Pell).

NSLDS Information		NSLDS Loan Detail		NSLDS Pell		NSLDS ACG		NSLDS NSG		NSLDS TEACH	
Johnny Page						0062					
SSN: 609-05-0020		NSLDS DOB: 11/03/1980		Last Updated: 11/03/2009		Last Effseq: 0					
Aggregate Data Find View All First 1 of 1 Last											
Eff Date: 11/03/2009		Seq: 0		NSLDS Txn Nbr:		NSLDS Transaction Source: Alert File		Detail			
Lifetime Eligibility Used:		10.00000									
NSLDS Pell Information Find View All First 1 of 3 Last											
Pell Seq:	1	Pell Txn Nbr:	01	Pell Updt:	01/01/2007	Pell Pd to Dt:	\$123456				
Pell Sched Amt:	\$123456	Posted to COD:	01/01/2007	Pell Prcnt Used:	123.4567						
Pell Schl Cd:	00131500	UNIVERSITY OF CALIFORNIA (UCLA				NSLDS Pell Verf:	ABC				
Pell Award Amt:	\$123456	NSLDS EFC:	123456	Pell Change Flag:	Y						
Pell Payment Period Limit:		Additional Elig Indicator:	Y								
Post 9/11 Dependent:	Y	First Time Pell Indicator:	Y								

NSLDS Pell page

NSLDS Pell Information

Lifetime Eligibility Used Displays the Lifetime Eligibility Used for Pell grant recipients which is the sum of all Pell Eligibility Used for all award years beginning with the 2008-2009 Award Year

NSLDS EFC(NSLDS Pell expected family contribution) Displays the EFC used when the particular Pell Award was paid.

NSLDS Pell Verf (NSLDS Pell verification) Displays the Verification status of the EFC.

Pell Change Flag Displays Y if there has been a change in the student's Pell eligibility.

Pell Payment Period Limit	Displays the payment period limit for Pell grants.
Post 9/11 Dependent	Displays <i>Y</i> if the student was a dependent of a post 9/11 deceased veteran.
Additional Elig Indicator (Additional Eligibility Indicator)	Displays <i>Y</i> if the student is eligible for two Pell grants in an award year.
First Time Pell Indicator	Displays <i>Y</i> if the Pell award is the student's first actual Pell disbursement.

Viewing NSLDS ACG Grant Details

Access the NSLDS ACG page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS ACG).

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS TEACH	NSLDS Additional Information
Art Vandelay		6137				
SSN: 605-06-0708		NSLDS DOB:	Last Updated: 09/25/2008		Last Effseq: 1	
Aggregate Data Find View All First ◀ 1 of 1 ▶ Last						
Eff Date: 09/25/2008		Seq: 1	NSLDS Txn Nbr: 1	NSLDS Transaction Source: ISIR		
Academic Competitiveness Grant Information Find View All First ◀ 1 of 2 ▶ Last						
Sequence:	1	Transaction Nbr:	01	Last Update:	05/15/2007	
School Code:	00132800	University Of Southern Califor		Academic Level:	2	
Award Amount:	\$1300	Paid to Date:	\$650	COD Seq Code:	001	
Eligibility Code:	01	Posted to COD:		ACG Change:		
High School Prog:	CA6001	Award ID:		Award Year:	2008	
Percent Elig Schedule Award:	100.0000	Scheduled Award:	\$1300	Percent Elig Acad Year:	100.0000	

NSLDS ACG page

Sequence	Displays the sequential key value assigned by the NSLDS load process.
Transaction Nbr (transaction number)	Displays the transaction number on the SAR or ISIR for the payment accepted by the school.
Last Update	Displays the last reported update to the grant record maintained by NSLDS.
School Code	Displays an 8-digit ED OPE code used to identify the school and branch attended by the student with the grant. The last two digits are 00 if no branch code exists.
Academic Level	Indicates the student's grade level for ACG and SMART grants.
Award Amount	Displays the accepted origination amount.

Paid to Date	Displays the amount of the Federal Grant the school has disbursed to the student.
COD Sequence Code	Displays the identifying sequence number from the Award ID for ACG and SMART grants.
Eligibility Code	Indicates the eligibility payment code for the ACG grant.
Posted to COD	Displays the date that disbursement was posted to the COD system. The format is CCYYMMDD.
ACG Change	Indicates change to this Academic Competitiveness Grant record in the current transaction, either <i>Y</i> or <i>N</i> .
High School Prog (high school program code)	Indicates the high school program code for the ACG grant.
Award ID	Displays the award ID provided by COD, which consists of: <ul style="list-style-type: none"> • SSN (9 characters) • Award Type (ACG = A) • Award Year (2 characters) • Pell School ID (6 characters) • Award Sequence Number (3 characters)
Percent Elig School Award (percent eligible school award)	Indicates the Total Percent Eligibility Used by Academic Year Level field from the NSLDS batch file layout.

Viewing NSLDS NSG Grant Details

Access the NSLDS NSG page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS NSG).

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS TEACH	NSLDS Additional Information
Art Vandelay		6137				
SSN: 605-06-0708		NSLDS DOB:		Last Updated: 09/25/2008		Last Effseq: 1
<div>Aggregate Data</div> <div>Find View All First 1 of 1 Last</div>						
Eff Date: 09/25/2008		Seq: 1		NSLDS Txn Nbr: 1		NSLDS Transaction Source: ISIR Detail
<div>National SMART Grant Information</div> <div>Find View All First 1 of 1 Last</div>						
Sequence: 1		Transaction Nbr: 01		Last Update: 07/07/2007		
School Code: 00132800		University Of Southern Califor		Academic Level: 3		
Award Amount: \$4000		Paid to Date: \$2000		COD Seq Code: 001		
Instructional Program Code: 01.0901		Posted to COD:		NSG Change:		
Award ID:				Award Year: 2008		
Percent Elig Schedule Award: 50.0000		Scheduled Award: \$4000		Percent Elig Acad Year: 100.0000		

NSLDS NSG page

The fields on the NSLDS NSG page are the same as the fields on the NSLDS ACG page with the following exceptions:

Instructional Program Code Indicates a student's major course of study; the CIP-designated (Classification of Instructional Programs designated) code for SMART grants.

NSG Change Indicates change to this NSG record in the current transaction, either *Y* or *N*.

Award ID Displays the Award ID provided by COD, which consists of:

- SSN (9 characters)
- Award Type (NSG = T)
- Award Year (2 characters)
- Pell School ID (6 characters)
- Award Sequence Number (3 characters)

Percent Elig School Award (percent eligible school award) Indicates the Total Percent Eligibility Used by Academic Year Level field from the NSLDS batch file layout.

Viewing NSLDS TEACH Grant Details

Access the NSLDS TEACH page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS TEACH).

NSLDS Information	NSLDS Loan Detail	NSLDS Pell	NSLDS ACG	NSLDS NSG	NSLDS TEACH	NSLDS Additional Information
Nikki Baker		FA0273				
SSN: 079-58-8865 NSLDS DOB: 09/14/1981 Last Updated: 12/13/2008 Last Effseq: 0						
Aggregate Data						Find View All First 1 of 4 Last
Eff Date: 12/13/2008 Seq: 0 NSLDS Txn Nbr: NSLDS Transaction Source: Alert File Detail						
UGRD Disbursement Amt: \$2000 UGRD Percent Elig Used: 50.0000 UGRD Remaining Amt: \$2000						
GRAD Disbursement Amt: GRAD Percent Elig Used: GRAD Remaining Amt:						
TEACH Grant Information						Find View All First 1 of 1 Last
Sequence: 1		Transaction Nbr: 01		Last Update: 01/01/2008		
School Code: 00131500		UNIVERSITY OF CALIFORNIA (UCLA)		Academic Level: 3		
Award Amount: \$2000		Award ID: 079588865H07001328002		Award Year: 2008		
Scheduled Award: \$2000		Paid To Date: \$2000		COD Seq Code: 001		
Loan Conversion: Y		Loan Conversion Date: 01/02/2008				

NSLDS TEACH page

Aggregate Data

The fields on the NSLDS TEACH page are the same as the fields on the NSLDS ACG page with the following exceptions:

UGRD Disbursement Amt (undergraduate disbursement amount)	Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the undergraduate academic levels.
GRAD Disbursement Amt (graduate disbursement amount)	Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the graduate academic levels.
UGRD Percent Elig Used (undergraduate percent eligibility used)	Displays the TEACH grant awarded percent used by Undergraduate/Post Baccalaureate Academic Levels.
GRAD Percent Elig Used (graduate percent eligibility used)	Displays the TEACH grant awarded percent used by Graduate Academic Levels.
UGRD Remaining Amt (undergraduate remaining amount)	Displays the remaining eligible amount used by Undergraduate/Post Baccalaureate Academic Levels. Displays N/A if no applicable grant exists.
GRAD Remaining Amt (undergraduate remaining amount)	Displays the remaining eligible amount by Graduate Academic Levels. Displays N/A if no applicable grant exists.

Teach Grant Information

Loan Conversion	Displays <i>Y</i> if TEACH Grant was converted to a loan and <i>N</i> if it has not been converted.
Loan Conversion Date	Displays the date the TEACH grant was converted to a loan. Displays <i>N/A</i> if grant was not converted.

Viewing NSLDS Additional Information

Access the NSLDS Additional Information page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Additional Information).

Art Vandelay 6137

SSN: 605-06-0708 NSLDS DOB: Last Updated: 09/25/2008 Last Effseq: 1

Aggregate Data Find | View All First 1 of 1 Last

Eff Date: 09/25/2008 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR [Detail](#)

NSLDS Overpayment Information Customize | Find | View All | First 1 of 1 Last

NSLDS Overpayment Seq	Aid Year	Overpayment Type	Overpayment Indicator	NSLDS Contact

NSLDS Name History Customize | Find | View All | First 1 of 1 Last

NSLDS Name Hist Seq	First Name History	MI Hist	Last Name History

NSLDS Additional Information page

The system displays the student's name, ID, SSN, NSLDS DOB, Last Updated, Eff Date (effective date), Last Effseq, (last effective sequence), Seq, (sequence), NSLDS Txn Nbr, (NSLDS transaction number), and NSLDS Txn Src (NSLDS transaction source).

NSLDS Overpayment Information

NSLDS Overpayment Seq (NSLDS overpayment sequence)	Displays the sequential order (1, 2, 3) in which the ISIR loads.
Overpayment Type	Displays the type of aid, such as Pell, Perkins, or SEOG, that was overpaid.

Overpayment Indicator Overpayment indicator refers to the overpayment. Values are:

N: No

Y: Yes

S: Satisfactory Arrangement.

NSLDS Contact Displays the agency school, servicer, or lender to contact for this loan.

NSLDS Name History

The system displays Nm Hist Seq (name history sequence), F Name Hist (first name history), MI Hist (middle initial history), and L Name Hist (last name history).

Using NSLDS Pushed Aggregate Data in the Packaging Process

To use NSLDS data in the Awarding and Packaging processes, you must ensure that the Packaging Processes are setup to use NSLDS as an aggregate source, load NSLDS Data via ISIR Load, FAH request, or TSM request, and push NSLDS data to aggregate aid tables.

This section describes the NSLDS Data Push process.

When you push NSLDS data, the following aggregate areas are updated:

- Subsidized Aggregate Area: The NSLDS Aggregate Subsidized Outstanding Principal Balance populates the NSLDS Total field .
- Unsubsidized Aggregate Area: The NSLDS Aggregate Unsubsidized Outstanding Principal Balance populates the NSLDS Total field.
- Perkins Aggregate Area: The NSLDS Perkins Total Outstanding Principal Balance populates the NSLDS Total field.
- ACG and SMART Aggregate Areas: A calculated ACG and SMART grant total, depending upon grade level, grant type, aid year and school code, populates the NSLDS Total field. For example, if NSLDS provides a paid-to-date amount of 433.00 USD for school code 001004 for academic level 2 and a paid-to-date amount of 433.00 USD for school code 001005 for academic level 2, the NSLDS Data Push aggregate program would update the ACG aggregate defined for academic level 2 with an NSLDS Total of 866.00 USD.
- TEACH Aggregate Areas: Distinct calculated TEACH undergraduate and graduate totals, depending upon grade level, aid year and school code, populate the respective Undergraduate and Graduate NSLDS Total fields.
- Pell Aggregate Area: A calculated summary of current award year Pell Disbursed Amounts populates the NSLDS Total field.
- Areas Subject to Overpayment: When the NSLDS Data Push process encounters an overpayment indicator for the Pell, SEOG, Perkins, ACG, SMART, and TEACH programs of either *Y* or *F*, it posts a value of 999,999,999.00 as the NSLDS Total for the corresponding aggregate area.

- Excluded NSLDS Transactions: For the Pell, ACG, SMART and TEACH grant programs, transactions that match like award types already internally packaged in the system are not included when determining which NSLDS transaction to sum and post to the NSLDS Total for a given aid year.

For example, if the NSLDS has the following ACG data...

ID	Eff Date	ACG Sequence	School Code	Transaction Nbr	Last Update	Paid to Date	Award Amount	School Year	Aid Yr
FAAG0010	2/28/2009	1	00131500	02	2/22/2009	750	1000	2	2010
FAAG0010	2/28/2009	2	00121200	01	2/22/2009	300	300	2	2009
FAAG0010	2/28/2009	3	00131500	02	2/22/2009	750	1300	1	2009
FAAG0010	2/28/2009	4	00121200	02	2/22/2009	100	1300	1	2009

Example of NSLDS data

...and the student has been awarded in the system with a school code 001315 for the 2010 aid year, the NSLDS Data Push process for the 2010 Aid Year excludes the transaction in the first row of the example data above. The process updates the NSLDS Total amount for Aggregate Area ACG2 to 300.00 and ACG1 to 850.00

Note. Because the NSLDS Data Push process evaluates the most recent NSLDS data regardless of source (ISIR, FAH, or TSM), the NSLDS data that is pushed may not include the complete lifetime amounts used. For example, if the most recent NSLDS data is from an ISIR, the ISIR only includes up to three transaction sequences of data for each grant and loan type. The ISIR record does provide flags and indicators if there are more than 3 transactions. Check the NSLDS Financial Aid Professionals web site for additional information.

See Chapter 5, "Setting Up Packaging Basics," Understanding Aggregate Aid, page 93.

Access the NSLDS Data Push page (Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS, NSLDS Data Push).

NSLDS Data Push

Run Control ID: AUDITS [Report Manager](#) [Process Monitor](#) Run

Parameters

*Aid Year: 2008

Run Option

☒ Refresh NSLDS Data
☐ Update NSLDS Data
☐ Preserve Override

Population Selection

☐ All students
☐ One student
☒ Students in list

List of IDs

ID

1 of 1

+

-

NSLDS Data Push page

Use this page to independently push NSLDS totals into the aggregate aid tables outside of the ISIR or NSLDS data load routines.

Aid Year	Select the aid year to be populated with the most current row of NSLDS data.
Run Option	<p><i>Refresh NSLDS Data:</i> Always overwrites the existing NSLDS Total present for the Aid Year defined above.</p> <p><i>Update NSLDS Data:</i> Updates NSLDS Total only if NSLDS data is more current than present data for the aid year defined above.</p> <p><i>Preserve Override:</i> Update does not take place if the NSLDS Total amount has been overridden at the student level.</p>
Population Selection	<p><i>All Students:</i> Use this option to update all students with NSLDS data who are active for the given aid year.</p> <p><i>One Student:</i> Select this option to enter one student ID to update. Then enter a single student ID.</p> <p><i>Students in a list:</i> Select this option to enter a list of student IDs to update. Then enter multiple student IDs in the List of IDs group box, which only displays when this option is selected.</p>

Viewing Application History

The oldest aid-year-specific pages are removed from the various menus and stored in the Financial Aid History menu. You can access pages and components for three years of processing.

This section discusses how to review application history.

Pages Used to View Application History

Page Name	Definition Name	Navigation	Usage
Historical Application Information	FA_APP_HIST_TRNSFR	Financial Aid, Financial Aid History, View Archived Application Data, Historical Application Information	Access Federal EFC Summary, Institutional Application, Application Data Verification, Institutional EFC Summary, and ISIR History components and pages.
Federal EFC Summary	ISIR_FM_SUMRY	Click the Federal EFC Summary link on the Historical Application Information page.	View archived EFC summary data.

Page Name	Definition Name	Navigation	Usage
Institutional Application	INST_STUDENT_A, INST_STUDENT_01, INST_STUDENT_02, INST_STUDENT_03	Click the Institutional Application link on the Historical Application Information page.	View data on the following pages in the Maintain Institutional Application component: Student Data, Parent Data, Miscellaneous Data, and Computation Data.
Application Data Verification	VERIFICATION_INC	Click the Application Verification link on the Historical Application Information page.	View data on the following pages in the Application Data Verification History component: Income Verification, Household Information, Worksheet A, Worksheet B, and Consolidated Tax Forms.
Institutional EFC Summary	INST_INAS_SMRY_06	Click the Institutional EFC Summary link on the Historical Application Information page.	View data for aid year.
RTIV Worksheet	STDNT_RTRN_TIV_WK1	Click the View RTIV Worksheet link on the Historical Application Information page. Then select the Return of Funds Worksheet page.	View the RTIV worksheet for the selected student and aid year.
Post Withdrawal Disb Tracking	TIV_PWD_TRACKING	Click the View RTIV PW Disbursement link on the Historical Application Information page.	View RTIV Post Withdrawal Disbursement information such as status (pending or complete) and disbursement dates.
Return of TIV Summary	RTRN_TIV_STU_TRACK	Click the View RTIV Return Summary link on the Historical Application Information page.	View RTIV summary information for students who have <i>Complete</i> or <i>Pending</i> status. The calculation period, amount due from school, and amount due from student is shown.

Reviewing Application History

Access the Historical Application Information page (Financial Aid, Financial Aid History, View Archived Application Data, Historical Application Information).

Historical Application Information

ID:	<input type="text" value="0002"/>	Federal EFC Summary	Institutional EFC Summary
Institution:	<input type="text" value="PSUNV"/>	Institutional Application	ISIR History
*Aid Year:	<input type="text" value="2006"/>	View RTIV Worksheet	Application Data Verification
Term:	<input type="text"/>	View RTIV PW Disbursement	View RTIV Fund Return
Program Type (Credit/Clock Hr):	<input type="text" value="Credit Hr"/>	View RTIV Return Summary	
Source:	<input type="text" value="Inst App"/>		

Historical Application Information page

Click any link to view the detailed information for the selected student and aid year.

- Source
- FT CSL:* full-time Canada student loan

Inst App: institutional application

NA: Need Access

PT CSL: part-time Canada student loan

Profile

Chapter 26

Satisfactory Academic Progress

This chapter provides an overview of Satisfactory Academic Progress (SAP) and discusses how to:

- Set up SAP.
- Process and maintain SAP.

Understanding SAP

This section includes an overview of SAP calculations and discusses:

- Eight tests for SAP.
- Student selection criteria for SAP evaluation.
- Batch, online, and simulation processes.
- Pass 1 and Pass 2 evaluations.

Overview of SAP Calculations

The SAP online or batch process determines a student's SAP status by comparing calculated values with established setup or student-specific rules. The process calculates up to eight separate tests. The institution chooses whether or not to use each of the following tests and sets the rules for each:

- Academic Standing
- Maximum Attempted Units
- Maximum Attempted Terms
- Minimum Current GPA
- Minimum Cumulative GPA
- Current Earned Units
- Cumulative Earned Units
- Two Year GPA

The process uses the user-defined rules to calculate a status code for each individual test and then calculates an overall status code. The overall status code is determined by the highest severity code for each test used. All calculated statistics and status codes are populated on the Student SAP page, which has a Packaging Status Summary link to the updated Satisfactory Academic Progress field on the Packaging Status Summary page.

The calculated code or override status code determines the Satisfactory Academic Progress value on the Packaging Status Summary page. This value is used for other Financial Aid processes and is only updated when the SAP process is run. Further change to the SAP status value can be made only on the Student SAP page, which automatically updates the Satisfactory Academic Progress field on other pages.

SAP calculation can be performed two ways:

- Term processing, which is based on a single term.
- Aid Year processing, which is based on multiple terms within an aid year.

When updating the Satisfactory Academic Progress field on the Packaging Status Summary page:

- Term processing looks up the term being processed on FA Term and uses that FA Term aid year to update the Packaging Status Summary page.
- Aid Year processing uses the aid year being processed to update the Packaging Status Summary page.

The calculation and evaluation of the rules of the eight tests uses a student's data from Student Career Term (Term History) and Student Enrollment, which are both term-based tables. Consequently, you must define which terms are evaluated for the calculation based on each of the two processing types (term and aid year). Here is how the two process types differ:

- For term processing, you define a specific term in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific term. For example, SAP eligibility for spring 2008 term is based on data from the fall 2007 and summer 2007 terms.
- For aid year processing, you define a specific aid year in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific aid year. For example, SAP eligibility for Aid Year 2008 is based on data from the fall 2006, spring 2007, and summer 2007 terms.

The SAP process selects the group of students to be updated based on selection entered on the run control page or established criteria for a single student when running online. The following table lists the hierarchy used by the process to determine which exception rule or setup rule to apply for each of the eight tests.

Rule	Consequence
Aid Year or Term Exceptions	If an override exists on the Aid Year Exceptions page or Term Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data), the student-specific aid year or term exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.

Rule	Consequence
Career Exceptions	If an override exists on the Career Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions), the student-specific career exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags for that test are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.
Academic Plan, Academic Program, Academic Career	The academic plan, academic program, and academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic plan, academic program, and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.
Academic Program, Academic Career	The academic program and academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic program and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.
Academic Career	The academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.

Eight Tests for SAP

The Satisfactory Academic Progress feature uses eight specific tests to measure whether a student is making progress. Three tests (Academic Standing, Maximum Attempted Units, and Maximum Attempted Terms) are quantitative evaluations and five tests (Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA) are qualitative evaluations. You set up rules for each test on the Criteria1 (quantitative) and Criteria2 (qualitative) pages.

During the test evaluation, each student's actual value for the test is calculated. Then the process searches through setup rules for a match to that value:

- If no rule matches are found, the student is considered to have passed the test and the Career Pass Default Status code is assigned as the SAP status for that test.
- If a rule match is found, the student is considered to have failed the test and the corresponding SAP status for that rule is assigned as the status and the fail flag is set to Yes.

The student should then be warned or disqualified. Therefore, it is strongly recommended that you set up the rules to cover the full range of fail requirements with no overlaps.

- An additional quantitative setup, Statuses and Actions, is used to compare a student's newly determined SAP status with a previous status and then assign a different status.

This can be used for multilevel probation statuses.

The SAP Status field in each of the test rule setup grids indicates which SAP Status code to use if a student meets the rules of the test. Ranges and statuses are set up to find students who are not making progress. The rules that you set up should cover the entire range by career, by career and program, or by career, program, and plan. If you set up a rule with program and plan blank, but ranges populated, the process evaluates all students based on the career defined on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup). It is important that the rules do not overlap each other as this can cause runtime errors. You can set up these failing tests for any academic program and academic plan combination.

Academic Standing Test

Student Records calculates the academic standing value each term. The Academic Standing test determines the SAP status code based on the Academic Standing value for either the evaluation term or for the maximum term the student was enrolled within the aid year as defined in the Define Evaluation Aid Year page. The SAP status is determined as follows:

- If the Academic Standing field is blank or an academic standing action row does not exist for the maximum term, the Undetermined Default Status code is used.
- If no student-specific exception exists for this criteria and the student is set to the Career Pass Default Status code, Student Records must enter an academic standing value for the student, which can then be calculated normally.
- For students affected by an aid year exception or a term exception, the SAP status is set to Exception Fail Default Status.
- If no override exists for academic standing, the process searches for a match by career, program, or plan and the associated SAP status is used if a match is found.

When no rule match exists, the Career Pass Default Status code is used.

Maximum Attempted Units Test

This test first counts the units attempted at the institution and does not include any transfer units. The total units attempted at the institution are summed from student enrollment, counting units that are within and prior to the term or aid year being processed. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution.

The student must be enrolled in the maximum term past the fully graded date. Audited units are not counted. Second, the transfer units are added to that sum from Student Career Term (Term History) based on the transfer unit options selected on the setup. If no transfer unit options are selected, then the Maximum Attempted Units test only includes units attempted at the institution.

Additionally, if course exclusions are set up and the student is enrolled in any of the defined courses, then those units are subtracted from the attempted unit calculation.

You can select any or none of the following options for including transferred units in attempted units:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.

- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

You can use the following Course Exclusion options to subtract Remedial and/or English as a Second Language (ESL) courses from attempted units:

- Subtract all remedial course units set up in Course Exclusions that the student is enrolled in unless the value of the total remedial units that the student is enrolled in exceeds the value in the Max Remedial Units to Exclude field. For example, if the student is enrolled in 8 remedial units, and the Max Remedial Units to Exclude value is 3, the SAP process count 5 of the 8 remedial units in the attempted unit calculation.
- Subtract all ESL course units set up in Course Exclusions that the student is enrolled in unless the value of the total ESL units that the student is enrolled in exceeds the value in the Max ESL Units to Exclude field.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test is based on the number of attempted terms by academic career, as indicated by student enrollment. A term is counted if units are taken, enrollment status is *enrolled*, and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

If a student has a career-specific exception, that is evaluated first. The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Minimum Current GPA Test

The Minimum Current GPA test tests whether a student's current GPA falls within a certain range in relation to a range of cumulative earned units. In an example test rule, a student who has between 31 and 60 cumulative earned units and current GPA between 0.00 and 2.99 is assigned a disqualified status.

This test evaluates both the student's current GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead, the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

The Minimum Current GPA test has two options, an average GPA or a special GPA.

Special GPA is calculated as follows:

- If a student has an aid-year or term-specific exception, that is evaluated first.
- If the Special GPA field is populated in the setup, the process compares that student's individual Special GPA Type value to the setup rules.
- If the Special GPA field is populated in the setup, and the Student Special GPA Type is blank or does not exist for the student, the Undetermined Default Status code is used.
- If the Special GPA field is not populated, an average GPA is calculated for this test and is compared to the setup rules.

This average is calculated by summing the total GPA for all terms for the student within the aid year and then dividing by the number of valid terms from the student career term data.

The current GPA is determined through evaluations:

- For Pass 1, the sum of all of GPAs of the fully graded terms associated with the Aid Year or Term being evaluated divided by the number of the fully graded terms associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005 (GPA = 2.50), spring 2006 (GPA = 3.00), and summer 2006 (GPA = 3.50), then the current GPA to be used in the test would be $(2.50 + 3.00 + 3.50)$ divided by 3 equaling 3.00.
- For Pass 2, the current GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005, spring 2006, and summer 2006, and no term data exists for the student, but the student does have spring 2005 term data, then the GPA for spring 2005 is used in the evaluation. Pass 2 does not look at the fully graded date.

The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test examines whether a student's cumulative GPA falls within a certain range in relation to a range of cumulative earned units. In an example test, a student who has between 31 and 60 cumulative earned units and a cumulative GPA between 0.00 and 2.00 would fail.

The Minimum Cumulative GPA test has two options, the Total Overall GPA and the Special GPA.

- If a student has an aid year- or term-specific exception, that is evaluated first.
- If a student has a career-specific exception, that is evaluated second.
- If the Use Special GPA Code field is populated in the setup, the student's Special GPA is used, if the student has a matching Special GPA Type defined.

- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used.

This is the total overall GPA including transfer units from student career term.

- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

This test evaluates both the student's cumulative GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test compares the student's attempted units and earned units and assigns an SAP status code. You choose to measure by percentage (percentage of completed units for the current term or aid year) or number of units (number of units to be completed for the current term, by term or aid year).

For example, a student whose attempted units for the current term were between 9 and 12 and earned units were between 0 and 6 might fail.

Unit values are calculated as follows:

- Attempted units are calculated from institutional units only.

Units are summed from student enrollment from the aid year or term being evaluated. To gather the sum of units attempted at the institution, the process uses the units taken value or if that value is zero, the Financial Aid progress units. The student must be enrolled in the maximum term past the fully graded date. Audited units do not count. Grade Exclusions are not factored into the Attempted Units portion of this test. No transfer units are included.

- Earned units are calculated in one of two ways:

If grade exclusions are not enabled, units are calculated as the sum of the values from the total passed with GPA and the total passed without GPA on the student career term table. Transfer units are included in the values being summed.

If grade exclusions are enabled, as with attempted units, the units are derived from student enrollment, but with transfer units included. Then courses that are on the grade exclusions setup are subtracted from the total.

With the attempted units and earned units determined for the aid year or term, the calculated SAP status code is determined in one of two ways:

- Use Percentage

The student-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage falls within the percentage range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

- Use Completed Units

The student-specific number is compared to the calculated number (earned/attempted). If the calculated earned units fall within the earned units range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Cumulative Earned Units Test

The Cumulative Earned Units test compares the student's cumulative attempted units and earned units and assigns an SAP status code. For example, a student whose cumulative attempted units were between 45 and 60 and cumulative earned units were between 0 and 30 would meet the rule.

Attempted units are institutional units summed from student enrollment and include units from all terms within and prior to the aid year or term being evaluated. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution. Audited units are not counted. Grade Exclusions are not included in attempted units. You then have the option to include different types of transfer units in addition to the institutional attempted units. Transfer Options include:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

Earned units are calculated in one of two ways:

- If grade exclusions are not enabled, first institutional units are taken from the cumulative earned unit value from student career term table for the term or highest term for the aid year being evaluated. Then transfer units are included based on the transfer unit options selected.
- If grade exclusions are enabled, units are summed from student enrollment similar to the base cumulative attempted units. Then courses that the student is enrolled in that are on the grade exclusions setup are subtracted from this total. Transfer units are included based on the transfer unit options selected.

You can use the following options for transfer units to be then included in the cumulative earned units calculation:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

With attempted units and earned units calculated, the calculated SAP status code is determined in one of two ways:

- Use Percentage

The student career-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage is equal to or greater than the student career specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated percentage is less than the student career-specific rule, the student receives the SAP status code associated with that rule.

- Use Completed Units

The student career-specific number is compared to the calculated number (earned/attempted). If the calculated earned number is equal to or greater than the student specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated earned number is less than the student career-specific rule, the student receives the SAP status associated with that rule.

Ensure that the setup covers the entire range of units and percentages or numbers by career, by career and program, or by career, program, and plan. If a rule match is not found, the student receives the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Two Year GPA Test

The Two Year GPA test reviews students who, at the end of their second year, are maintaining at least a C grade point average, that is, a 2.0 or above grade average. This test checks whether a student's current GPA falls within a certain range in relation to a range of attempted terms. In an example test rule, a student who has attempted between 3 and 4 terms and whose current GPA is between 0.00 and 1.99 is assigned a nonpassing status.

Attempted terms are counted by academic career from student enrollment. A term is counted if units are taken, enrollment status is *enrolled*, and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

Two options for deriving the cumulative GPA value are the Total Overall GPA and the Special GPA:

- If the Special GPA field is populated in the setup, the Special GPA type is used, which is the cumulative GPA earned at this institution.
- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used. This is the Total Overall GPA including transfer units from student career term.
- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA is as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA is from the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

In the setup, you must define the number of terms that equals two years of study at your institution. You can set up rules for any combination of terms and GPA by career, by career and program, or by career, program, and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Student Selection Criteria for SAP Evaluation

Student selection criteria are the same for online, batch, or simulation processing. If the student has an active FA term for the aid year (aid year processing) or term (term processing) and the career used for the SAP evaluation is not excluded by award type or career, the student is considered eligible for SAP evaluation, and the process attempts to create an SAP calculation or simulation.

Award Exclusions

For Award Exclusions, the system excludes if either the financial aid item type matches or the item type falls within the range defined by the Item Type From and Item Type To values on the Exclusions page.

You can list awards that are excluded from SAP evaluation:

- A student who has only the item types listed in the award exclusions setup is not selected for an SAP evaluation.

- A student who has both excluded item types and nonexcluded item types is selected for an SAP evaluation.
- If exclusions are set up with a financial aid type, but without values in the Item Type To and Item Type From fields, students who have awards only of that financial aid type are not selected for an SAP evaluation.

Note. Award Exclusions are the only exclusions that affect whether or not a student is selected for an SAP Evaluation. Course and Grade exclusions affect the results of specific tests. Course Exclusions affect the results of the Maximum Attempted Units test. Grade Exclusions affect the Current Earned Units test and the Cumulative Earned Units test.

Standard SAP Selection, Student Override, and Population Selection

Use the one of three options to select IDs for SAP evaluation, Standard SAP Selection, Student Override, or Population Selection.

- If you use the Standard SAP Selection, all IDs for the associated career defined in the run control with the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page are selected for an SAP evaluation. If you use the Student Override options or Population Selection option, the selection is limited to a subset of IDs.
- If you use the Student Override option, only the IDs entered in the override section of the run control page are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use the Population Selection option, only the IDs provided by the Population Selection feature's input Selection Tool are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use either the Student Override or Population Selection option:
 - If an ID meets the SAP Evaluation criteria, the process attempts to calculate an SAP Status for that ID.
 - If an ID does not meet the SAP Evaluation criteria, no SAP action is taken for that ID.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Batch, Online, and Simulation Processes

The online and simulation SAP processes always run with the following options enabled:

- Use Pass 2 data.
- Run if a previous status for the same term/aid year exists.
- Do not create Report Data.
- Update any existing SAP data if any calculation value changes occur, even if the SAP status remains the same.

- Use Statuses and Actions rules.

Therefore, ensure that all academic statuses are entered in the setup for Statuses and Actions, or the process might return an incorrect Calc SAP Status value.

In a batch process, these settings are optional and can be modified on the Process SAP run control page. To process SAP for a single student with different options than the online process uses, enter that ID in the Student Override section, and set the run control options as desired for that student.

Pass 1 and Pass 2 Evaluations

The SAP process evaluates SAP for each student two times, Pass 1 and Pass 2.

Pass 2 is optional when running in batch, but is always used online or in simulation. In batch, if the Pass 2 option is selected, the process calculates for both Pass 1 and Pass 2, and uses the Pass 2 calculation results unless there are no Pass 2 calculation results, and then Pass 1 results must be used. If the Pass 2 option is enabled, and no Pass 1 data exists, Pass 2 data is used for the SAP calculation.

Pass 1 and Pass 2 data collection differs as follows:

Pass 1	Pass 2
<p>Pass 1 evaluates at the most recent SAP evaluated term/aid year where the fully graded date is less than or equal to today's date.</p> <p>That is, the maximum term (term processing) or terms within the aid year (aid year processing) after the fully graded date is used for the SAP evaluation. Only Pass 1 calculations are compared to prior term or aid year SAP records.</p> <p>The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status.</p> <p>For example, an institution that processes by term runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and the fully graded date for spring 2005 has passed, the SAP process uses spring 2005 term data to evaluate the SAP tests and rules to determine the SAP status. If the spring 2005 fully graded date is in the future, then there is no Pass 1 evaluation for the student.</p> <p>The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status.</p> <p>When complete, the processing message of Pass 1 is displayed in the Student SAP page and indicates the term used.</p>	<p>Pass 2 finds the most recent term/aid year that should be evaluated based on the evaluation term/aid year setup. If that term/aid year is not available for the student, Pass 2 uses data from the most recent term/aid year, even if that term/aid year is not part of the evaluation term/aid setup for that term/aid year.</p> <p>For example, an institution that processes by term runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and no row exists for a student for spring 2005, but a row exists for fall 2004, the SAP process uses fall 2004 to evaluate the SAP tests and rules to determine the SAP status.</p> <p>When complete, the processing message of Pass 2 is displayed in the Student SAP page and indicates the term used. If an Override SAP Status code exists, it is not removed.</p>

Setting Up SAP

The SAP Setup pages are used to set up your rules that determine an SAP status for each of the eight tests. The rules are designed to be failure rules. If a student's actual test value matches a setup rule, the test fails. If a student's actual test value does not meet a rule, the student receives the Career Pass Default Status code for that test. For better processing performance, keep the rules as simple as possible.

Use the remaining setup pages to set up course and award exclusions, communications, and evaluation terms and aid years.

This section discusses how to:

- Define SAP status codes.
- Set up rules for statuses and actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term tests.
- Set up tests for Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.
- Set up course, award, and grade exclusions.
- Set up SAP communications.
- Set up evaluation terms for aid year processing.
- Set up evaluation terms for term processing.

Pages Used to Set Up SAP

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Setup	SFA_SAP_STATUS_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup	Define SAP status codes, code severity, and default SAP status codes.
Criteria1	SFA_SAP_ACADST_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 1	Set up statuses and actions. Set up rules for quantitative tests: Academic Standing, Max Attempted Units, and Max Attempted Terms.
Criteria2	SFA_SAP_ACADST_TB2	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 2	Set up rules for qualitative tests: Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.

Page Name	Definition Name	Navigation	Usage
Exclusions	SFA_SAP_GRADEBS_EX	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Exclusions	Set up remedial and ESL course exclusions. Set up financial aid award exclusions. Set up grade exclusions.
Communications and Checklists	SFA_SAP_CMK_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Communications and Checklists	Set up codes and message text for communicating results of tests.
Define Evaluation Aid Year	SFA_SAP_ET_AYR	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Aid Year	Set up terms for evaluation aid year processing.
Define Evaluation Terms	SFA_SAP_ET_TRM	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Terms	Set up terms for evaluation term processing.

Defining SAP Status Codes

Access the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

Setup

Criteria1

Criteria2

Exclusions

Communications and Checklists

Academic Institution: PSUNV PeopleSoft University
Academic Career: GRAD Graduate
Set Up Activation: Inactive

SAP Setup Find | View All First 1 of 1 Last

***Effective Date:** 08/12/2008

SAP Process Type

***SAP Process Type:** Aid Year

Status Codes Customize | Find | View All | First 1-5 of 7 Last

Calc Status	Severity	Short Description	Description	SAP Status		
DISQ	80	Disq	Disqualified	Not Meet	+	-
EF	40	EF	Exceptional Fail	Probation	+	-
MEET	20	Meet	Meets Criteria	Meets SAP	+	-
PRB1	60	Prob 1	Second Probation	Not Meet	+	-
PROB	30	Prob	Probationary Status	Probation	+	-

Default SAP Status

No Prior Academic History Default Status: MEET

Undetermined Default Status: UDET

Career Pass Default Status: MEET

Exception Fail Default Status: EF

Zero Earned Units Default Stat: ZERO

Setup page

Use the Setup page to define, by institution and career, the SAP status codes and code severity, and how the SAP status updates the satisfactory academic progress value on the student's Packaging Status Summary page. To modify a status code, click the + icon to the right of the Effective Date field to create new setup criteria, and make the changes.

Ensure that this page is set up and saved before doing any further setup. Never delete SAP status codes after you start creating student SAP data because those codes would then be invalid in the Student SAP record.

The Set Up Activation field defines whether the SAP setup is active or inactive at this institution:

- If an *Active* value exists for *any* career at the institution level, the Satisfactory Academic Progress field on the Packaging Status Summary page is a display-only field with the SAP Details link shown.
- If an *Inactive* value exists, the online, batch, or simulation processes cannot run successfully. The Satisfactory Academic Progress field on the Packaging Status Summary page can be edited.

SAP Process Type

The two process types are *Aid Year* and *Term*. To change from one type to the other, insert a new row at the Effective Date field level and update the setup. The value in the Effective Date field determines which row is used compared to the current date.

Aid year processing is for multiple terms, which you define on the Define Evaluation Aid Year page.

Term processing is for a single term, which you define on the Define Evaluation Term page.

Status Codes

It is important that your SAP status codes are relevant and define your student population. Be sure you have a code that represents a passing status, such as MEET.

Calc Status (calculated status)	Enter a four-character code for the default statuses, the calculated status for each test evaluation, and the overall status for the Status and Actions test.
Severity	<p>Enter a number to control the priority of status codes and to determine the Calc SAP Status code for a student if the student has a different code for each test.</p> <p>The code with the highest severity number becomes the Calculated SAP Status code. Ensure that:</p> <ul style="list-style-type: none"> • Each severity number is unique. • The most severe status code has the highest severity number assigned to it.
Short Description	Enter a brief description of the Calc Status code.
Description	Enter a detailed description of the Calc Status code.
SAP Status	<p>Select a translate value to associate with Calc Status. The SAP Status is the status that appears in the Satisfactory Academic Progress field on the student's Packaging Status Summary page.</p> <p>To understand how these statuses are used by packaging and awarding: See Chapter 27, "Preparing for Awarding and Packaging," Reviewing the Packaging Status Summary Page, page 941.</p> <ul style="list-style-type: none"> • Meets SAP • Not Meet • Probation • Undetrmine

Default SAP Status

The SAP evaluation process assigns these default statuses for particular cases, as described below. For each of these default statuses, select a status code that you defined in the Status Codes group box.

No Prior Academic History Default Status	If a student does not have any prior student career term record data, this status is assigned.
Undetermined Default Status	<p>If a calculation cannot be determined for a student due to missing information, this status is assigned to both the specific test and as the Overall Calculated SAP Status. Examples of missing information are:</p> <ul style="list-style-type: none"> • No Special GPA when the Use Special GPA Code option is selected. • Academic Standing is blank. • There is no cumulative or current GPA.
Career Pass Default Status	If a student does not meet the rules of a particular test, then this status is assigned. Also, if a student has been evaluated for other tests but has no fail statuses for those tests, this status is assigned as the Calc SAP status.
Exception Fail Default Status	<p>If a student has had any career, term, or aid year test exceptions defined and the test fails using these exceptions, then this status is assigned. The process checks for student-specific exceptions first. If the student has exceptions defined and the process does not fail using those exceptions, it then assigns the Career Pass Default Status and the test rules are not evaluated.</p> <p>It is recommended that the SAP Code associated with this default be the highest severity of the Not Meet status codes.</p> <p>For more information about defining student-specific exceptions: See Chapter 26, "Satisfactory Academic Progress," Processing and Maintaining SAP, page 910.</p>
Zero Earned Units Default Status	If a student's earned units is equal to 0 for either the Current Earned Units or Cumulative Earned Units calculation, this default status is assigned.

Setting Up Rules for Statuses and Actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term Tests

Access the Criteria1 page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 1).

Setup

Criteria1

Criteria2

Exclusions

Communications and Checklists

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

SAP Setup

Find | View All

First 1 of 1 Last

Effective Date: 01/01/1900

Expand All Collapse All

Statuses and Actions

☒ Use Statuses and Actions

▼ Statuses and Actions Rules

Customize | Find | View All

First 1-5 of 5 Last

Previous SAP Status	Calc SAP Status	Final SAP Status		
ALMO	PRB1	PRB1	+	-
DISQ	PRB1	PRB2	+	-
EF	EF	PRB2	+	-
MEET	MEET	MEET	+	-
PRB1	PRB2	DISQ	+	-

Academic Standing Test

☒ Use Academic Standing Test

▼ Academic Standing Rules

Customize | Find | View All

First 1-5 of 7 Last

Academic Program	Academic Plan	Academic Standing	SAP Status		
FAU	ARTHIS	DIS1	DISQ	+	-
FAU	ARTHIS	DIS2	DISQ	+	-
FAU	ARTHIS	PRB1	ALMO	+	-
FAU	BIOLBS	DIS2	DISQ	+	-
LAU		DIS1	DISQ	+	-

Criteria1 page (1 of 2)

Maximum Attempted Units Test

☒ Use Max Attempted Units Test

Max Attempted Units Option

Transfer Unit Criteria:

☒ Towards GPA ☒ Course Credit ☒ Other Credit
☒ No GPA ☒ Test Credit ☒ TC Units Adjust

Max Attempted Units Rules

Customize | Find | View All | First 1-3 of 3 Last

Academic Program	Academic Plan	Attempted Max Units From	Attempted Max Units To	SAP Status		
LAU		0.000	100.000	DISQ	+	-
LAU		150.000	180.990	PRB1	+	-
LAU		181.000	999.000	DISQ	+	-

Maximum Attempted Terms Test

☒ Use Max Attempted Terms Test

Max Attempted Terms Rules

Customize | Find | View All | First 1-5 of 7 Last

Academic Program	Academic Plan	Max Terms From	Max Terms To	SAP Status		
FAU		13	15	PRB2	+	-
FAU		16	18	PRB1	+	-
FAU		19	99	DISQ	+	-
LAU		0	4	DISQ	+	-
LAU		13	15	PRB1	+	-

Criteria1 page (2 of 2)

Use the Criteria1 page to define your quantitative SAP requirements. You set up rules that determine how to set a final status based on a previously calculated status and a currently calculated status. You also set the rules and options for three of the eight SAP tests.

Click the Expand All button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the Collapse All button to collapse the tests. Or, use the expand/collapse arrow on each test to expand the grid for only that test.

Warning! You specify from-to ranges for attempted terms and units on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Statutes and Actions

Select the Use Statutes and Actions check box to use this feature and set up rules. When using Statutes and Actions, make sure that all possible statutes and actions are set up. The Statutes and Actions feature is always executed for the online process and is an option for batch.

Previous SAP Status	Select the most recently calculated term or aid year status value to be evaluated.
Calc SAP Status (calculated SAP status)	Select the current SAP Calculated Status code.
Final SAP Status	Select the Overall SAP Status Code for term or aid year to be assigned if a student's Previous SAP Status and Calc SAP Status match the values selected in this row.

If the process cannot find a rule match for previous and calculated status, the final status that is generated may be incorrect. Therefore it is important to ensure that all possible statutes and actions are set up. Blank setup values are not allowed.

Academic Standing Test

The Academic Standing Rules group box indicates which academic standing values used by Academic Careers, Academic Program, and Academic Plan are not meeting Academic Standing and may be ineligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing Academic Standing statuses and non-passing SAP Statuses.

Select the Use Academic Standing Test check box to set up rules for the Academic Standing test.

Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.
Academic Standing	Select an Academic Standing status in the context of the academic program (and academic plan, if selected) to associate with a SAP Status. If blank or a row for the term does not exist, the Undetermined Default Status code is used.
SAP Status	Select the SAP Status to use if the Academic Standing value from Student Records matches this setup.

Maximum Attempted Units Test

The Maximum Attempted Units test defines maximum units a student can attempt before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Max Attempted Units Test check box to set up rules for the Maximum Attempted Units test.

In the Max Attempted Units Option group box, select the transfer unit criteria to include in the maximum attempted unit total. You can select any combination of the following check boxes, or select none.

Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined as included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined as not to be included in the GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.
Test Credit	Select this check box to include test credits in the maximum attempted units count.
Other Credit	Select this check box to include other credits in the maximum attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.
Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.
Attempted Max Units From (attempted maximum units from)	Enter the starting number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the starting number, it is included in the range. <hr/> Warning! The Attempted Max Units From field and Attempted Max Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans. <hr/>
Attempted Max Units To (attempted maximum units to)	Enter the ending number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the ending number, it is included in the range.
SAP Status	Select the SAP status code to use when the student's attempted units value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test defines the maximum terms a student can enroll in before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Max Attempted Terms Test check box to set up rules for the Maximum Attempted Terms test.

Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.
Max Terms From (maximum terms from)	Enter the starting number for the range of terms that a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range. <hr/> Warning! The Max Terms From field and Max Terms To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans. <hr/>
Max Terms To (maximum terms to)	Enter the ending number for range of terms a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.
SAP Status	Select the SAP status code to use when the student's attempted terms value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Setting Up Tests for Minimum Current or Cumulative GPA, Current or Cumulative Earned Units, and Two-Year GPA

Access the Criteria2 page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 2).

SetupCriteria1Criteria2ExclusionsCommunications and Checklists

Academic Institution:PSUNVPeopleSoft University

Academic Career:UGRDUndergraduate

SAP Setup

Find | View AllFirst1 of 1Last

Effective Date:01/01/1901Expand AllCollapse All

Minimum Current GPA Test

☒ Use Min Current GPA Test

Use Special GPA Code:

Minimum Current GPA Rules

Customize | Find | View AllFirst1-3 of 3Last

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Min Cur GPA From	Min Cur GPA To	SAP Status		
FAU		0.010	999.990	1.001	1.890	DISQ		
FAU		0.010	999.990	1.900	1.990	PRB2		
LAU		0.010	100.000	0.000	1.999	DISQ		

Minimum Cumulative GPA Test

☒ Use Min Cumulative GPA Test

Use Special GPA Code:

Minimum Cumulative GPA Rules

Customize | Find | View AllFirst1-5 of 7Last

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Minimum Cum GPA From	Minimum Cum GPA To	SAP Status		
		0.000	100.000	0.000	1.999	DISQ		
FAU		130.000	150.000	0.010	1.790	DISQ		
FAU		151.000	180.000	0.010	1.900	DISQ		
FAU		181.000	999.990	1.990	2.000	DISQ		
LAU		0.000	30.000	0.010	1.990	PRB1		

Criteria2 page (1 of 3)

hry

Current Earned Units Test

☒ Use Current Earned Units Test

Current Earned Units Option

Use Completed Units

Current Earned Units Rules Customize | Find | View All | First 1-2 of 2 Last

Academic Program	Academic Plan	Cur Attempted Units From	Cur Attempted Units To	Cur Earned Units From	Cur Earned Units To	SAP Status		
FAU		0.010	999.990	0.000	0.010	DISQ	+	-
LAU		0.010	999.990	0.000	100.000	DISQ	+	-

Cumulative Earned Units Test

☒ Use Cumulative Earned Units Test

Cumulative Earned Units Options

Use Completed Units

Cumulative Attempted Transfer Unit Criteria:

☒ Towards GPA ☒ Course Credit ☒ Other Credit
☒ No GPA ☒ Test Credit ☒ TC Units Adjust

Cumulative Earned Transfer Unit Criteria:

☒ Towards GPA ☒ Course Credit ☐ Other Credit
☒ No GPA ☐ Test Credit ☒ TC Units Adjust

Cumulative Earned Units Rules Customize | Find | View All | First 1-4 of 4 Last

Academic Program	Academic Plan	Cum Attempted Units From	Cum Attempted Units To	Cumulative Earned Units From	Cumulative Earned Units To	SAP Status		
FAU		15.000	29.990	0.010	14.990	PRB1	+	-
FAU		30.000	46.000	20.000	29.990	PRB2	+	-
FAU		90.000	999.990	0.000	0.010	DISQ	+	-
LAU		0.000	100.000	0.000	100.000	DISQ	+	-

Criteria2 page (2 of 3)

Two Year GPA Test

☒ Use Two Year GPA Test

Use Special GPA Code:

Two Year GPA Rules Customize | Find | View All | First 1 of 1 Last

Academic Program	Academic Plan	Terms From	Terms To	Cum GPA From	Cum GPA To	SAP Status		
LAU		3	4	0.000	1.999	DISQ	+	-

Criteria2 page (3 of 3)

Use the Criteria2 page to define your qualitative SAP requirements and the rules for four of the eight SAP tests.

Click the Expand All button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the Collapse All button to collapse the tests. Or, use the expand or collapse arrow on each test to expand the grid for only that test.

Warning! You specify from-to ranges for the five tests on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Minimum Current GPA Test

The Minimum Current GPA test determines the lowest current GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Min Current GPA Test check box to set up rules for the Minimum Current GPA test.

Use Special GPA Code Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used.

If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.

Academic Program Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

Cum Earned Units From (cumulative earned units from) Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine which SAP status should be used.

Warning! The Cum Earned Units From field and Cum Earned Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans or if your minimum current GPA range is different between rows.

Cum Earned Units To (cumulative earned units to) Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.

Min Cur GPA From (minimum current GPA from) Enter the minimum value of the range of minimum current GPA used to determine the SAP status.

Warning! The Min Cur GPA From field and Min Cur GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.

Min Cur GPA To (minimum current GPA to)	Enter the maximum value of the range of Minimum Current GPA used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test determines the lowest cumulative GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Min Cumulative GPA Test check box to set up rules for the Minimum Cumulative GPA test.

Use Special GPA Code	Select a value in this field to use a student's special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used. If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.
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Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
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Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.
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Cum Earned Units From (cumulative earned units from)	Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.
---	---

Warning! The Cum Earned Units From field and Cum Earned Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your minimum cumulative GPA range is different between rows.

Cum Earned Units To (cumulative earned units to)	Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.
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Minimum Cum GPA From (minimum cumulative GPA from)

Enter the minimum value of the range of minimum cumulative GPA used to determine the SAP status.

Warning! The Minimum Cum GPA From field and Minimum Cum GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.

Minimum Cum GPA To (minimum cumulative GPA to)

Enter the maximum value of the range of minimum cumulative GPA used to determine the SAP status.

SAP Status

Indicate which SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test evaluates the student's attempted units and earned units and compares the quotient (earned/attempted) to the rules. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses. Define the percent or minimum number of current term or aid year units a student must complete of attempted units per term.

Select the Use Current Earned Units Test check box to set up rules for the Current Earned Units test.

In the Current Earned Units Option list, select whether to use percentage or units:

- Select *Use Percentage* to use the percentage of completed units for the current term or aid year.
- Select *Use Completed Units* to use a minimum number of units to be completed for the current term, by term or aid year.

Fields for the Current Earned Units test change depending on the option that you select. For example, if you select *Use Percentage*, the Cur Earned Units % From and Cur Earned Units % To fields appear.

Academic Program

Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan

Select a value in the Academic Planfield for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

Cur Attempted Units From (current attempted units from)	<p>Enter the minimum current value of the range of attempted units to identify the minimum percentage or number range used to determine the SAP status.</p> <hr/> <p>Warning! The Cur Attempted Units From field and Cur Attempted Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current earned units (% or number) range is different between rows.</p> <hr/>
Cur Attempted Units To (current attempted units to)	<p>Enter the maximum current value of the range of attempted units to identify the maximum percentage or number range used to determine the SAP status.</p>
Cur Earned Units % (or Number) From (current earned units percentage [or number] from)	<p>Enter the minimum value of the range of current earned (passed) percentage or number used to determine the SAP status.</p> <hr/> <p>Warning! The Cur Earned Units % (or Number) From field and Cur Earned Units % (or Number) To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current attempted units range is different between rows.</p> <hr/>
Cur Earned Units % (or Number) To (current earned units percentage [or number] to)	<p>Enter the maximum value of the range of current earned (passed) percentage or number used to determine the SAP status.</p>
SAP Status	<p>Select the SAP status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.</p>

Cumulative Earned Units Test

For the Cumulative Earned Units test, you define the percent or minimum number of units a student must complete of attempted units per term. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Cumulative Earned Units Test check box to set up rules for the Cumulative Earned Units test.

In the Use Cumulative Earned Units Options drop-down list, select whether to use percentage or completed units for term or aid year processing:

- *Use Percentage:* Use the percentage of completed units for the current term or aid year.
- *Use Completed Units:* Use a minimum number of units to be completed.

For Cumulative Attempted Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative attempted unit total. You can select any combination of boxes, or select none.

Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined to be included in GPA in the cumulative attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined to not be included in GPA cumulative attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA cumulative attempted units count.
Test Credit	Select this check box to include test credits in the cumulative attempted units count.
Other Credit	Select this check box to include other credits in the cumulative attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the cumulative attempted units count.

For Cumulative Earned Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative earned unit total. You can select any combination of boxes, or select none.

Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined to be included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined to not be included in GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.
Test Credit	Select this check box to include test credits in the maximum attempted units count.
Other Credit	Select this check box to include other credits in the maximum attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.
Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.

Cum Attempted Units From (cumulative attempted units from)	Enter the cumulative minimum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status. <hr/> Warning! The Cum Attempted Units From field and Cum Attempted Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units (% or number) range is different between rows. <hr/>
Cum Attempted Units To (cumulative attempted units to)	Enter the cumulative maximum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status.
Cumulative Earned Units % (or Number) From (cumulative earned units percentage [or number] from)	Enter the minimum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status. <hr/> Warning! The Cum Earned Units % (or Number) From field and Cumulative Earned Units % (or Number) To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative attempted units range is different between rows. <hr/>
Cumulative Earned Units % (or Number) To (cumulative earned units percentage [or number] to)	Enter the maximum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Two Year GPA Test

Select the Use Two Year GPA Test check box to set up rules for the Cumulative Earned Units test.

Use Special GPA Code	Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used. If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.
Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are <i>only</i> evaluated for those specific rules.
Terms From	Enter the starting number for the range of terms that a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range. <hr/> Warning! The Terms From field and Terms To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative GPA range is different between rows. The Terms From value can be the same as the Terms To value within the same row. <hr/>
Terms To	Enter the ending number for range of terms a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Cum GPA From (cumulative GPA from)	Enter the beginning value of the range of cumulative GPA used to determine the SAP status. <hr/> Warning! The Cum GPA From field and Cum GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your terms range is different between rows. <hr/>
Cum GPA To (cumulative GPA to)	Enter the ending value of the range of cumulative GPA used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Setting Up Course, Award, and Grade Exclusions

Access the Exclusions page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Exclusions).

Setup	Criteria1	Criteria2	Exclusions	Communications and Checklists
-------	-----------	-----------	-------------------	-------------------------------

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate

SAP Setup Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

Course Exclusions

☒ Use Course Exclusions

Max Units to Exclude

Max ESL Units to Exclude:
 Max Remedial Units to Exclude:

Course Exclusions Customize | Find | View All First 1 of 1 Last

*Course ID	*Offer Nbr		*Course Type		
<input type="text"/>	<input type="text"/>		Remedial	<input type="button" value="+"/>	<input type="button" value="-"/>

Award Exclusions

☒ Use Award Exclusions

Award Exclusions Customize | Find | View All First 1 of 1 Last

Source	Fin Aid Type	Item Type From	Item Type To		
<input type="text"/>	Scholarship	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Grade Exclusions

☒ Use Grade Exclusions

Grade Exclusions Customize | Find | View All First 1 of 1 Last

*Grading Scheme	*Grading Basis	*Grade Input		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Exclusions page

Use the Exclusions page to identify English as a Second Language (ESL) and remedial courses for exclusions and place caps on the number of ESL and remedial courses to exclude for calculating Maximum Attempted Units. Identify student records to exclude from the SAP selection process based on types of awards and/or identify grades to exclude from cumulative and current earned units calculation.

Course Exclusions

Course Exclusions are used in the Maximum Attempted Units Test to identify ESL and remedial courses that should be excluded in the count and to also place caps on the number of ESL and remedial courses to exclude from the unit count.

Select the *Use Course Exclusions* check box to set up rules for Max Units to Exclude and Course Exclusions.

The Max Units to Exclude (maximum units to exclude from all course exclusions) group box has two selections.

Max ESL Units to Exclude (maximum ESL units to exclude)	<p>Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank.</p> <p>If a student has more ESL units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the Course Type of <i>ESL</i> in the Course Exclusions grid for this maximum to be invoked.</p>
Max Remedial Units to Exclude (maximum remedial units to exclude)	<p>Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank.</p> <p>If a student has more remedial units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the course type of <i>Remedial</i> in the Course Exclusions grid for this maximum to be invoked.</p>

Course Exclusions are criteria for excluding courses from the Maximum Attempted Units test. Excluded courses include Remedial courses or ESL courses.

Course ID	Select the course ID of the class to exclude from the Maximum Attempted Units test calculation regardless of grade.
Offer Nbr (offer number)	Select the course offer number of each class to exclude from the Maximum Attempted Units test calculation regardless of grade. To totally exclude the class, the course offer number must be included.
Course Type	Select the type of class, <i>Remedial</i> or <i>ESL</i> .

Award Exclusions

Award Exclusions are criteria for excluding students from the selection for an SAP evaluation based on an aid type or specific awards you specify.

Select the Use Award Exclusions check box to use this function.

Source	Select a fund source. This field is informational only. There is no system logic using this selection.
Fin Aid Type (financial aid type)	Select a financial aid type to exclude students who only have awards with that financial aid type from the SAP evaluation selection.
Item Type From and Item Type To	Select the beginning and end of a range of financial aid item types, to exclude students who have awards from only those item types, from the SAP evaluation selection.

Grade Exclusions

Grade Exclusions are criteria for excluding course units with specific grading schemes, grading basis, and grade input values from the Current Earned Unit and/or Cumulative Earned Units tests.

If you use Grade Exclusions, the Current and Cumulative Earned Units values are derived from the student's enrollment, minus the units to be excluded. If you do not use Grade Exclusions, the Current and/or Cumulative Units value is derived from the student's Career Term data.

You must set up any and all course grades that you do not want to be counted toward earned units, including Failing grades.

Select the Use Grade Exclusions check box to use this function.

Grading Scheme	Enter the Grading Scheme to be used to define the Grading Basis and Grade Input for exclusion from the Current Earned Unit and/or Cumulative Earned Units tests.
Grading Basis	Enter the Grading Basis to be used to define the Grade Input for exclusion from the Current Earned Unit test, the Cumulative Earned Units test, or both tests.
Grade Input	Enter the Grade Input to be excluded from the Current Earned Unit and/or Cumulative Earned Units tests.

Setting Up SAP Communications

Access the Communications and Checklists page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Communications and Checklists).

Setup	Criteria1	Criteria2	Exclusions	Communications and Checklists
Academic Institution: PSUNV PeopleSoft University Academic Career: UGRD Undergraduate				
SAP Setup Find View All First 1 of 1 Last				
Effective Date: 01/01/1900				
Events Customize Find View All First 1-2 of 2 Last				
SAP Status		Event ID		
DISQ		SAPDENY		
PRB1		SAPPROB		
Communication Comments Customize Find View 7 First 1-8 of 8 Last				
Comment ID		Description		
Academic Standing		Your Academic Standing is ACADSTND		
Max Attempted Units		Your Max Attempted Units is MAXATTU		
Max Attempted Terms		Your Max Terms is MAXTERMS		
Min Current GPA		Your minimum current GPA is MINCURGP		
Min Cumulative GPA		Your minimum cumulative GPA is MINCUMGP		
Current Earned Units		Your current earned units is CURERNU		
Cumulative Earned Units		Your cumulative earned units is CUMERNU		
Two Year GPA		Your GPA after two years of study is TWOYRGPA		

Communications and Checklists page

The Create SAP Communications process updates the 3C Trigger table in PeopleSoft Enterprise Campus Community.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine."

Events

SAP Status Select the SAP status code.

Event ID Select the event ID. The event ID contains the Communication and Checklist Code/Item to be assigned and is set up under Campus Community.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Campus Event Planning," Naming an Event.

Communication Comments

Comment ID

Select an SAP Test for which you want comments inserted into the 3C Trigger table.

Comment ID values are associated with the eight SAP tests. If the comment ID for a particular test is set up here, the SAP 3C process generates a comment in the 3C Trigger table by student for each test that the student has failed.

If the student fails multiple tests, multiple comments are appended into one comment and inserted into the communication comment field on the 3C Trigger table.

Description

Enter the text for the comment ID in this free-form field to create specific messages to students who fail one of the eight SAP evaluation tests.

To include the student's actual failed data value from the Student SAP page in the comment, use the desired Hardcode Variable from the following table when entering your comment text.

Comment ID and Variables

The following table details the Comment ID values, variables, and examples of Description entries and resulting comments. The Comment ID values are the same as the field names from the Actual column on the Student SAP page.

Comment ID	Hardcode Variable	Example Description	Example Comment
Academic Standing	ACADSTND	Your current academic standing is ACADSTND.	Your current academic standing is DISQ.
Cumulative Earned Units	CUMERNU	The cumulative unit amount you have earned, CUMERNU, does not meet our requirements.	The cumulative unit amount you have earned, 19.000, does not meet our requirements.
Current Earned Units	CURERNU	CURERNU is the amount of your current earned units.	8.000 is the amount of your current earned units.
Max Attempted Terms	MAXTERMS	The number of terms you have attempted at PeopleSoft University is MAXTERMS.	The number of terms you have attempted at PeopleSoft University is 10.000.
Max Attempted Units	MAXATTU	You have attempted MAXATTU units at PeopleSoft University.	You have attempted 12.00 units at PeopleSoft University.
Min Cumulative GPA	MINCUMGP	Your cumulative GPA is MINCUMGP.	Your cumulative GPA is 1.125.

Comment ID	Hardcode Variable	Example Description	Example Comment
Min Current GPA	MINCURGP	Your GPA for fall semester is MINCURGP; this does not meet university requirements.	Your GPA for fall semester is 1.013; this does not meet university requirements.
Two Year GPA	TWOYRGPA	Your GPA after two years of study is TWOYRGPA.	Your GPA after two years of study is 1.109.

Setting Up Evaluation Terms for Aid Year Processing

Access the Define Evaluation Aid Year page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Aid Year).

Define Evaluation Aid Year

Academic Institution: PSUNV PeopleSoft University

Academic Career: GRAD Graduate

Aid Year Find | View All First 1 of 3 Last

*Aid Year: 2005 Financial Aid Year 2004-2005

Evaluation Terms Customize | Find | First 1-3 of 3 Last

Term ID	Term Name	Add	Remove
0522	2004 Summer	+	-
0518	2004 Spring	+	-
0505	2003 Fall	+	-

Define Evaluation Aid Year page

Use this page to select terms for aid year processing for the selected aid year. The Evaluation Terms field prompts a list of all terms defined at your institution.

Setting Up Evaluation Terms for Term Processing

Access the Define Evaluation Terms page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Terms).

Define Evaluation Terms

Academic Institution: PSUNV PeopleSoft University

Academic Career: GRAD Graduate

Terms

Find | View All First 1 of 1 Last

*Term: 0610 2008 Fall

+

-

Evaluation Terms

Customize | Find | 1-2 of 2 First Last

1	0600	2008 Spring	+	-
2	0605	2008 Summer	+	-

Define Evaluation Terms page

Use this page to select terms for term processing for the selected aid year. The Evaluation Terms field prompts a list of all terms defined at your institution.

Processing and Maintaining SAP

This section discusses how to:

- Run the SAP batch process.
- Maintain student SAP.
- View the Satisfactory Academic Progress field.
- Define student-specific career exceptions.
- Define student-specific aid year exceptions or term exceptions.
- Create SAP communications.
- Simulate a student SAP calculation.
- Review students from a batch run.

Note. When running an online, batch, or simulated SAP process, there must be an active FA Term row for either the aid year or the term being processed. Also, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

Pages Used to Process and Maintain SAP

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process SAP	SFA_RUN_SAP	Financial Aid, Satisfactory Academic Progress, Process SAP	Run the batch SAP process. The setup must have a status of active for the process to execute successfully.
Student SAP	SFA_SAP_STDNT	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Student SAP	Run the SAP process for an individual student, view SAP calculated values, set student level exclusions, and set the use of the Override SAP Status. The setup must have a status of active for the process to execute successfully.
Packaging Status Summary	STDNT_AID_PACKAGE	Click the Packaging Status Summary link from the Student SAP page.	View the Satisfactory Academic Progress field value.
Career Exceptions	SFA_SAP_STDNT2	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions	Define exceptions at the student level.
Term Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT3	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Term Exceptions	Define exceptions at the student level for term processing.
Aid Year Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT4	Financial Aid, Satisfactory Academic Progress, Aid Year Exceptions	Define exceptions at the student level for aid year processing.
Create SAP Communications	SFA_RUN_SAP3C	Financial Aid, Satisfactory Academic Progress, Create SAP Communications	Set up event triggers for 3C communications.
Simulate Student Eligibility	SFA_SAP_STDNT_SIM	Financial Aid, Satisfactory Academic Progress, Simulate Student Eligibility	Simulate SAP status processing without saving data.
Review Report Data	SFA_SAP_RPT	Financial Aid, Satisfactory Academic Progress, Review Report Data	Store batch SAP status details by run control IDs.

Running the SAP Batch Process

Access the Process SAP page (Financial Aid, Satisfactory Academic Progress, Process SAP).

Process SAP

Run Control ID: TEST [Report Manager](#) [Process Monitor](#) Run

Population Selection

☐ Population Selection

Input Parameters

*Academic Institution: PSUNV PeopleSoft University

*Academic Career: UGRD Undergraduate

Term: 0590 2007 Fall

Selection Criteria: Student Override

*Processing Option: Update and Report

☒ Update using most recent evaluation term (Pass 2)

☒ Skip Status and Actions

☐ Don't Run If SAP Status Exists

Update Options

☐ Calc SAP Status Change Only

☒ Any Calculation Value Change

Student Override

☒ Student Override

ID		Name		
1	AA0003	Brown, Allison	+	-
2	AA0008	Hoffman, Donna	+	-

Process SAP page

Before running the SAP process, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

Population Selection

The Population Selection check box is selected or cleared, depending on the value in the Selection Criteria field in the Input Parameters group box on this page. When the check box is selected, population selection options appear in the Population Selection group box.

For more information on population selection:

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Population Selection	<p>This check box is selected by default when you select <i>Population Selection</i> in the Selection Criteria field in the Input Parameters group box on this page.</p> <p>Use the Population Selection option to restrict the selection of IDs to only the IDs identified by a tool configured to select a specific population. Only identified IDs are selected for an SAP evaluation. If they meet the evaluation criteria, an SAP calculation is created.</p> <p>If the preview functionality is enabled for the selection tool, you can preview the population selection results before you run the process.</p>
Selection Tool	<p>This field is available if the Population Selection check box is selected. Select from <i>Equation Engine</i>, <i>PS Query</i>, or <i>External File</i>, or enter a tool that your institution created to select the IDs to review for an SAP calculation. Additional parameters are displayed for your selected tool.</p>
Query Name	<p>Select a query to use for Population Selection. This field is available only when <i>PS Query</i> is selected in the Selection Tool field. Select a PS Query that uses the SFA_SAP_BIND bind record.</p>
Input Parameters	
Aid Year	<p>Select the aid year for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of <i>Aid Year</i> for the career in context in your SAP setup.</p>
Term	<p>Select the term for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of <i>Term</i> for the career in context in your SAP setup.</p>
Selection Criteria	<p>Select one of three options to determine which IDs are selected and evaluated for an SAP Calculation.</p> <p>Select <i>Population Selection</i> to use the Population Selection feature to select IDs for an SAP evaluation. When selected, the Population Selection check box is selected, the options in the Population Selection group box are displayed, the Student Override check box is not available, and the Student Override grid is hidden.</p> <p>Select <i>Student Override</i> to manually enter in specific IDs for an SAP evaluation in the Student Override grid. When selected, the Student Override check box is enabled, the Student Override grid is displayed, the Population Selection check box is disabled, and the Population Selection options are hidden.</p> <p>Select <i>Standard SAP Selection</i> to use the built-in SAP selection criteria to select IDs for an SAP evaluation. This option disables the Student Override and Population Selection check boxes and hides both the Student Override grid and the Population Selection options.</p>

Processing Option

Select the processing option:

- *Update and Report* inserts the same row into the Student SAP Record and the Review Report Data page.
- *Report Only* inserts a row into the Review Report Data page. Use this option to see the results before updating the SAP status on the Packaging Status Summary page.
- *Update Only* inserts a row into the Student SAP Record.

Update using most recent evaluation term (Pass 2)

Select this check box to update Pass 2 into the Student SAP record. If this is not selected, Pass 2 results are not updated in the Student SAP record.

Pass 2 processing occurs when the student does not have a row for the term or aid year being processed. Statistics from the latest term or aid year are used to calculate the student's SAP Status.

Skip Status and Actions

Select this check box to skip the Statuses and Actions set up when processing for multiple aid years or terms. This avoids an incorrect Calc SAP status from being calculated. If this option is selected on the SAP processing run control and Statuses and Actions are set up and selected, they are skipped.

Use this option when you are running multiple aid year or term processes and comparing with the prior status would not be accurate. This option obtains the actual calculated SAP status for the student and does not evaluate the prior statuses and any matching statuses and action rules.

As an example, you would not select this option in this case: If processing in January for spring 2006 and for fall 2006, the previous fall 2005 is the maximum term past the fully graded date that both processing terms select. If the process is run for spring 2006 with a status of *Probation*, then runs for fall 2006, it calculates *Probation*, then compares it to the spring value of *Probation*, and gives an overall status of *Disqualified* which would be incorrect.

Don't Run If SAP Status Exists

Select this check box if you do not want to recalculate for students who already have a SAP Status code for either the aid year or term that you are processing.

Update Options

These options appear only when the Don't Run If SAP Status Exists check box is not selected.

Calc SAP Status Change Only (calculate SAP status change only)

Select this option to insert a new SAP record if no SAP record exists for the run control values or if the Calc SAP Status code changes.

Any Calculation Value Change

If this option is selected, the process inserts a new row (create a new SAP calculation) if any of the values change from a previous calculated row for the same term/aid year - even if the resulting changes do not change the Calculated Status. It also inserts a new row if no row exists.

If this option is not selected, then a new row is only inserted if there is a change to the Calculated Status. It also inserts a new row if none exists, unless there is no data to process for that term or aid year.

Student Override

Select the Student Override option to display the Student Override grid for entry of student IDs. Enter the IDs of the students to be considered for SAP evaluation. If the students meet the evaluation criteria, an SAP calculation is created. Only the IDs you list are processed.

Maintaining Student SAP

Access the Student SAP page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Student SAP).

Student SAP

Career Exceptions

Term Exceptions

ID: FASAP0043 Parson,Jill

Institution: PSUNV PeopleSoft University

Career: UGRD Undergraduate

Term: Calc SAP

Student SAP

Find | View All First 1 of 1 Last

Term: 0620 2009 Spring [Packaging Status Summary](#) Meets SAP

Program: LAU Liberal Arts Undergraduate

Plan: ENGL-BA English (BA)

Calc SAP Status: MEET Meets SAP

Override SAP Status:

Updated: User ID:

Comments:

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	Y	GOOD	N/A	N/A	<input type="checkbox"/>	MEET	10	N/A	0610
Max Attempted Units:	Y	49.000			<input type="checkbox"/>	MEET	10	N	N/A
Max Attempted Terms:	Y	3.000			<input type="checkbox"/>	MEET	10	N	N/A
Min Current GPA:	Y	3.000			<input type="checkbox"/>	MEET	10	N	N/A
Min Cumulative GPA:	Y	3.265			<input type="checkbox"/>	MEET	10	N	N/A
Current Earned Units:	Y	18.000			<input type="checkbox"/>	MEET	10	N	N/A
Cumulative Earned Units:	Y	49.000			<input type="checkbox"/>	MEET	10	N	N/A
Two Year GPA:	Y	3.265			<input type="checkbox"/>	MEET	10	N	N/A

SAP Calculation Data

Current Units Attempted: 18.000

Cumulative Units Attempted: 49.000

Two Year Nbr of Terms: 3

Processing Information

Process User Id: PS

Process Date/Time: 06/12/09 2:23:52PM

Processing Message: Statistics Calc Pass 1, Term 0610

Student SAP page

All students with an FA Term built are able to access the SAP Student Data page, which allows for online SAP calculation for an individual student. Students must have an active row in FA Term for the term or aid year that is being processed. If an active row does not exist, the process executes but returns a blank page, or, if a previous status exists, the existing page data is displayed.

Note. Before running the online process, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

This page displays the SAP status code and all the calculation results used to determine a student's SAP status code.

The Aid Year or Term field is displayed depending on the setup criteria. Enter the aid year or term to process for the SAP online process.

Click the Calc SAP button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the SAP Calculation Results, SAP Calculation Data, and Processing Information group boxes are populated.

Student SAP

Aid Year or Term	The aid year or term used in the SAP online or batch calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.
Packaging Status Summary	Click this link to view the Satisfactory Academic Progress field on the Packaging Status Summary page. This page is shown in the next section of this chapter.
Program	Displays the academic program from FA Term that was used to determine SAP status.
Plan	Displays the academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	Displays the calculated SAP status that controls the value in the SAP field on the Packaging Status Summary page. To access this page, click the Packaging Status Summary link.
Override SAP Status	You can enter a SAP status to override the calculated SAP status. If populated, this status overrides the value in the Calc SAP Status field and controls the Satisfactory Academic Progress field on the Packaging Status Summary page. Delete the override status before running the process after the fully graded date.
Updated	Displays the date that an override is placed on the student's SAP record.
User ID	Displays the user ID of the person who applied the override.
Comment	A comment can be placed in this field to provide additional information on a student's SAP. Use the comment field when you override a student's SAP Status.

SAP Calculation Results

Test	The eight tests used to determine an SAP status. The possible tests are: <ul style="list-style-type: none"> • Academic Standing • Max Attempted Units • Max Attempted Terms • Min Current GPA • Min Cumulative GPA • Current Earned Units • Cumulative Earned Units • Two Year GPA
Used	Indicates whether this test was used to determined SAP status.
Actual	Displays the calculated value for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	Displays the lower end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Rule Range To	Displays the upper end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Failed	Displays as checked if the student failed the test.
Status	Displays the calculated status for each test.
Severity	Displays the severity of each SAP test. The status of the test with the highest severity is used to populate the Calc SAP Status field.
Exception Used	Indicates whether an exception rule was used to determine SAP status.
Term	Displays the term used to evaluate academic standing from Student Records. Only displays for the Academic Standing test.

SAP Calculation Data

Current Units Attempted	Displays the number of units the student is attempting for the evaluation term or aid year terms. This is used in the Current Earned Units test.
--------------------------------	--

Cumulative Units Attempted	Displays the cumulative number of units the student attempted, up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.

Processing Information

Process User ID	Displays the user ID of the person who ran the batch process.
Process Date/Time	Displays the date and time when the process was run.
Processing Message:	<p>Displays the source of the status code:</p> <ul style="list-style-type: none"> • Default SAP Status. The status assigned to students who pass all of the selected tests. • Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year. • Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

Viewing the Satisfactory Academic Progress Field

Access the Packaging Status Summary page. (Click the Packaging Status Summary link from the Student SAP page.)

Packaging Status Summary			
Marla Steele		ID:	FASAP0042
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution: PSUNV
EFC Status: Unofficial TERM ISIR Information Database Matches Need Summary PELL PELL Calculation Override			
Counselor:	<input type="text"/>		
Academic Career:	<input type="text"/>		
Aid Processing Status:	No Electronic Application		
Aid Application Status:	Active	*Satisfactory Academic Progress:	Meets SAP SAP Details
Review Status:	Incomplete	Disbursement Hold:	
INST Verification Status:	Non Select	Loan Counseling Status	
Verification Flag:	Not Req'd		
Verification Status:	Not Select		
Scholarship Status:	Not Eval	Award Notification	
*Aid Packaging Method:	Not Pkg'd		
Packaging Plan ID:	<input type="text"/>		
Repackaging Plan ID:	<input type="text"/>		
Aggregate Source:	Default		
Aggregate Used:			

Self Service
 Award Access: Denied
☒ Inquiry Access
☐ External Award Access

Packaging Status Summary page

Satisfactory Academic Progress Enter the SAP status. If the field is not editable, active SAP setup data exists. When active setup data exists, the Process SAP process updates this value based on the SAP status code setup.

SAP Details Click this link to navigate to the Student SAP page.

Defining Student-Specific Career Exceptions

Access the Career Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions).

Student SAP	Career Exceptions	Term Exceptions
ID: FASAP0043	Parson,Jill	Institution: PSUNV PeopleSoft University
Career: UGRD	Undergraduate	Term: <input type="text"/> Calc SAP
<div> <div>Career Exceptions</div> <div>Find View All First 1 of 1 Last</div> <div> <div>Effective Date: 06/17/2009 </div> <div>*Status: Active </div> </div> <div> <div>Attempted Max Units: <input type="text"/></div> <div>Attempted Max Terms: <input type="text"/></div> <div>Min Cumulative GPA: <input type="text"/></div> <div>Cum Earned Units %: <input type="text"/></div> <div>Cum Earned Units: <input type="text"/></div> <div>Two Year GPA: <input type="text"/> Terms From: <input type="text"/> Terms To: <input type="text"/></div> <div>Comments: <input type="text"/></div> </div> <div> <div>Audit Information</div> <div>Last Update UserId: <input type="text"/></div> <div>Last Update Date/Time: <input type="text"/></div> </div> </div>		

Career Exceptions page

This page is for student-specific career rules, rewriting the rule at the student level for the Effective Date and Status control when the student-specific career rule is applied. If any career rules fail when processing, the Exception Failure Default Status is applied and the exception flag is set to Y for the test using the exception.

The SAP status assigned for any career exception failure is the Exception Fail Default Status. It is recommended that this Severity code is the highest of the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed.

Career Exceptions

Effective Date Date this rule is applied.

Status *Active:* Rule is active and in effect.
Inactive: Rule is inactive and not in effect.

Attempted Max Units Enter the total number of attempted units to which the student is limited.
 (attempted maximum units)

Attempted Max Terms Enter the this total number of attempted terms to which the student is limited.
 (attempted maximum terms)

Min Cumulative GPA Enter the minimum cumulative GPA that the student must have.
 (minimum cumulative GPA)

Cum Earned Units % (cumulative earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) to which the student is limited.
Cum Earned Units (cumulative earned units)	Enter the minimum number of (attempted units divided by earned units) to which the student is limited.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Comments	Enter remarks up to 254 characters, that apply to the student career exception.

Defining Student-Specific Term Exceptions

Access the Term Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Term Exceptions).

The screenshot displays the 'Term Exceptions' page within a web application. At the top, there are tabs for 'Student SAP', 'Career Exceptions', and 'Term Exceptions'. Below the tabs, student information is shown: ID: FASAP0043, Name: Parson, Jill, Institution: PSUNV, and Career: UGRD. A 'Term' field is empty, and a 'Calc SAP' button is visible. The main section is titled 'Term Exceptions' and contains a search bar, a 'Find | View All' link, and a 'First 1 of 1 Last' indicator. The form includes the following fields: 'Term' (with a search icon), 'Override Academic Standing' (checkbox), 'Min Cumulative GPA', 'Min Current GPA', 'Cur Earned Units %', 'Cur Earned Units', 'Two Year GPA', 'Terms From', 'Terms To', and 'Comments'. At the bottom, there is an 'Audit Information' section with fields for 'Last Update UserId' and 'Last Update Date/Time'.

Term Exceptions page

This page appears when the process type set up for this student's institution and career is set to term processing. This page is for student-specific term rules. The rules apply only to the specific term entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An active FA Term record must exist for term being processed.

Term Exceptions

Term	Enter the term to which these specific student rules apply.
Override Academic Standing	Select this check box to override the academic standing rule for students with Warning or Disqualified status.
Min Cumulative GPA (minimum cumulative GPA)	Enter the minimum cumulative GPA that a student must achieve at the end of the term.
Min Current GPA (minimum current GPA)	Enter the minimum current GPA that the student must achieve for the term.
Cur Earned Units % (current earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) for the term that the student must achieve.
Cur Earned Units (current earned units)	Enter the minimum number of attempted/earned units for the term that the student must achieve.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Comments	Enter remarks up to 254 characters that apply to the student term exception.

Audit Information

Last Update User ID	Displays the user ID of the person who last saved change to this page.
Last Update Date/Time	Displays the date and time when this page was last saved.

Defining Student-Specific Aid Year Exceptions

Access the Aid Year Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Aid Year Exceptions).

Student SAP		Career Exceptions		Aid Year Exceptions	
ID:	FA0600	Suazo, John B	Institution:	PSUNV	PeopleSoft University
Career:	GRAD	Graduate	Aid Year:	<input type="text"/>	<input type="button" value="Calc SAP"/>

Aid Year Exceptions Find | View All First 1 of 1 Last

*Aid Year:

☐ Override Academic Standing

Min Cumulative GPA:

Min Current GPA:

Cur Earned Units %:

Two Year GPA: Terms From: Terms To:

Comments:

Audit Information

Last Update UserId:

Last Update Date/Time:

Aid Year Exceptions page

This page appears when the process type set up for this student's institution and career is set to aid year processing. This page is for student-specific aid year rules. The rules apply only to the specific aid year that is entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An active FA Term record must exist within the aid year being processed.

Note. For descriptions of the fields on this page, refer to the documentation about the fields on the Term Exceptions page and replace *term* with *aid year*.

Creating SAP Communications

Access the Create SAP Communications page (Financial Aid, Satisfactory Academic Progress, Create SAP Communications).

Create SAP Communications

Run Control ID: TEST

[Report Manager](#)
[Process Monitor](#)
[Run](#)

Input Parameters	
*Academic Institution:	<input type="text" value="PSUNV"/> <input type="button" value="Search"/> PeopleSoft University
*Academic Career:	<input type="text" value="UGRD"/> <input type="button" value="Search"/> Undergraduate
Term:	<input type="text" value="0590"/> <input type="button" value="Search"/> 2007 Fall
*SAP Status Code:	<input type="text" value="DISQ"/> <input type="button" value="Search"/> Not Meeting Standards

Create SAP Communications page

The SAP Communications process inserts a row into the Event 3C Trigger table. The unmodified (vanilla) Event Process creates the 3C elements as set up in the Event setup record. You can control the production of duplicate communications by using the unmodified (vanilla) event processing controls.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Identifying Trigger Conditions.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Campus Event Planning," Naming an Event.

Term or Aid Year Enter the maximum row in the Student SAP record for either term or aid year.

SAP Status Code Enter the SAP Status Code for which you want to create SAP communications.

Simulating a Student SAP Calculation

Access the Simulate Student Eligibility page (Financial Aid, Satisfactory Academic Progress, Simulate Student Eligibility).




Simulate Student Eligibility

ID: FASAP0043 Parson,Jill

Career: UGRD Undergraduate

Institution: PSUNV PeopleSoft University

Term: Calc SAP

Student SAP

Term: 0620 2009 Spring

Program: LAU Liberal Arts Undergraduate

Plan: ENGL-BA English (BA)

Calc SAP Status: MEET Meets SAP

Override SAP Status:

SAP Calculation Results

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	Y	GOOD	N/A	N/A	<input type="checkbox"/>	MEET	10	N/A	0610
Max Attempted Units:	Y	49.000			<input type="checkbox"/>	MEET	10	N	N/A
Max Attempted Terms:	Y	3.000			<input type="checkbox"/>	MEET	10	N	N/A
Min Current GPA:	Y	3.000			<input type="checkbox"/>	MEET	10	N	N/A
Min Cumulative GPA:	Y	3.265			<input type="checkbox"/>	MEET	10	N	N/A
Current Earned Units:	Y	18.000			<input type="checkbox"/>	MEET	10	N	N/A
Cumulative Earned Units:	Y	49.000			<input type="checkbox"/>	MEET	10	N	N/A
Two Year GPA:	Y	3.265			<input type="checkbox"/>	MEET	10	N	N/A

SAP Calculation Data

Current Units Attempted:	18.000	Cumulative Units Attempted:	49.000
Two Year Nbr of Terms:	3		

Processing Information

Process User Id: PS

Process Date/Time: 06/12/2009 2:23:32PM

Processing Message: Statistics Calc Pass 1, Term 0610

Simulate Student Eligibility page

To run the SAP process for a single student without updating the SAP Student Data page, use this page to process SAP status online.

Depending on your setup criteria, either the Term or Aid Year field appears. Enter the aid year or term to process for the SAP online process.

Click the Calc SAP button to run the SAP simulation process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the SAP Calculation Results, SAP Calculation Data, and Processing Information group boxes are populated.

Student SAP

Aid Year or Term

The aid year or term used in the batch or online SAP calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.

Program	The academic program from FA Term that was used to determine SAP status.
Plan	The academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	The calculated SAP status that controls the value in the Satisfactory Academic Progress field on the Packaging Summary Status page.
Override SAP Status	If populated, this status overrides the value in the Calc Sap Status field and controls the Satisfactory Academic Progress field on the Packaging Summary Status page. Delete the override status before running the process after the fully graded date.

SAP Calculation Results

Test	Eight tests are used to determine an SAP status. The possible criteria are: <ul style="list-style-type: none"> • Academic Standing • Max Attempted Units • Max Attempted Terms • Min Current GPA • Min Cumulative GPA • Current Earned Units • Cumulative Earned Units • Two Year GPA
Used	Indicates whether this test was used to determine SAP status.
Actual	The calculated value is populated for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	If the student failed this test, the rule displays in the lower end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.
Rule Range To	If the student failed this test, the rule displays in the upper end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.
Status	Displays the calculated status for each test.
Severity	Displays the severity of the SAP status. The status with the highest severity is used to populate the Calc SAP Status field.

Term	Displays the term used to evaluate Academic Standing from Student Records. This field appears for the Academic Standing test only.
-------------	--

SAP Calculation Data

Current Units Attempted	Displays the number of units that the student is attempting for the evaluation term/aid year terms. This is used in the Current Earned Units test.
Cumulative Units Attempted	Displays the cumulative number of units that the student attempted up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.

Processing Information

Processing Message	<p>The message identifies the source of the status code:</p> <ul style="list-style-type: none"> • Default SAP Status. The status assigned to students who pass all of the selected tests. • Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year. • Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.
---------------------------	---

Reviewing Students from a Batch Run

After running the SAP process in batch, you can use the Review Report Data page to review the results for all eight tests for all students processed in the batch. This page is available when you select either the *Update and Report* or the *Report Only* option on the Process SAP page.

Access the Review Report Data page (Financial Aid, Satisfactory Academic Progress, Review Report Data).

Review Report Data

Run Control ID: PS

User: PS

Institution: PSUNV

Career: UGRD

Term: 0550

Run Date and Time: 07/22/08 1:46:09PM

Customize Find View 100 First 1-50 of 512 Last								
Student Data Acad Standing Max Units Max Terms Min Current GPA								
	ID	Institution	Career	Term	Program	Plan	Calc SAP Status	Override SAP Status
1	FA0605	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
2	FA0607	PSUNV	UGRD	0550	LAU	UNDECL-UG	ZERO	
3	FA0608	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
4	FA0609	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
5	FA0610	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
6	FA0611	PSUNV	UGRD	0550	LAU	UNDECL-UG	ZERO	
7	FA0612	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
8	FA0613	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
9	FA0615	PSUNV	UGRD	0550	FAU	UNDECL-UG	UK	
10	FA0616	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
11	FA0618	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
12	FA0622	PSUNV	UGRD	0550	FAU	UNDECL-UG	DISQ	
13	FA0624	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
14	FA0625	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
15	FA0626	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
16	FA0628	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
17	FA0632	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
18	FA0633	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
19	FA0634	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
20	FA0635	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
21	FA0636	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
22	FA0637	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
23	FA0638	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
24	FA0640	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	

Review Report Data

Chapter 27

Preparing for Awarding and Packaging

This chapter discusses how to:

- Make early financial aid offers.
- Select your application data source for awarding.
- Enter veteran education benefits.
- Review the student's packaging status.
- Manage aggregate aid.
- Use Mass Change for packaging status attributes.
- Award restricted aid.

Making Early Financial Aid Offers

Your institution may use early financial aid offers as part of your admission recruitment process. Early financial aid offers are associated with a career. Because a student can apply for more than one career, this feature enables you to assign an early financial aid offer for each career's admission application the student may submit. Early financial aid offers must have an effective date so that the history of early financial aid offers can be tracked.

The early financial aid offer enables you to award estimated aid to students based on early financial aid categories you define. Select as many of these categories as you want. For each category, you enter an estimated amount of aid, and whether the award category should be offered, accepted, canceled, or declined.

This section lists prerequisites and discusses how to:

- Create early financial aid offers.
- View admissions application information.

Prerequisites

Before you create early financial aid offers using award categories, you must set up early financial aid offer categories.

See Also

Chapter 5, "Setting Up Packaging Basics," Preparing for Early Financial Aid Offers, page 138



Pages Used to Make Early Financial Aid Offers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Early Financial Aid Offer	ERLY_FA_OFFER	Financial Aid, Awards, Early Financial Aid Awards, Offer Early Financial Aid, Early Financial Aid Offer	Create or modify early financial aid offers.
Admission Application Detail	FA_APPL_SEC	Click the Detail link on the Early Financial Aid Offer page.	View admissions application information for the student.

Creating Early Financial Aid Offers

Access the Early Financial Aid Offer page (Financial Aid, Awards, Early Financial Aid Awards, Offer Early Financial Aid, Early Financial Aid Offer).


Early Financial Aid Offer

Alexa Martinez FA0341   



Career: Undergraduate **Career Nbr:** 0 **Program Nbr:** 0

Application Nbr: 00022523 **Academic Program:** Liberal Arts Undergraduate [Detail](#)

Find First 1 of 1 Last

***Effective Date:** 06/23/2004  **Sequence:** 1 **Aid Year:** 2005  **Offer Total:** \$2500.00 + -

Find | View All First 1-3 of 3 Last

*Aid Category	Status	Offer Amount
 SCHOLR Scholarships	Offered 	\$1,500.00 + -
 GRANT Grants	Offered 	\$1,000.00 + -
 LOANS Financial Aid Loans	Offered 	\$3,000.00 + -

Early Financial Aid Offer page

Warning! It is strongly advised that the financial aid office work closely with the admissions office regarding the use of early financial aid offers. Early financial aid offers do not require a student to be checked for eligibility for financial aid awards. If a student is offered an early financial aid offer but later is found to be ineligible for aid or for the amount of aid offered, your institution could be held liable for the student's funding.

A student can have multiple admissions applications for multiple programs that may be in multiple careers. The Career Nbr (career number), Program Nbr (program number), and Application Nbr (application number) fields display sequential numbers for multiple admissions applications.

Detail	Click to access the Admission Application Detail page and review the status of the student's admissions application.
Sequence	Enables you to have up to ten early award offers for each day, working in conjunction with the effective date. The system increases the sequence automatically, or you can enter a particular sequence number.
Aid Year	Populates automatically based on the aid year selected in the user default settings. To change the aid year, use correction mode.
Offer Total	The total amount of early financial aid that you have awarded to the student.
Aid Category	<p>Select the appropriate aid category for the type of aid that you are offering the student. The categories you set up on the Early Aid Categories page are available in this field.</p> <p>See Chapter 5, "Setting Up Packaging Basics," Preparing for Early Financial Aid Offers, page 138.</p>
Status	<p>The current action being taken on the aid category.</p> <p><i>Accepted:</i> The student has accepted the offered aid category.</p> <p><i>Canceled:</i> You have canceled the offered aid category.</p> <p><i>Declined:</i> The student has declined the offered aid category.</p> <p><i>Offered:</i> The aid category has been offered to the student, but no response has been received from the student yet.</p>
Offer Amount	The amount for the aid category that you want to offer the student.

Viewing Admission Application Information

Access the Admission Application Detail page (click the Detail link on the Early Financial Aid Offer page).

Admission Application Detail			
Complete:	N	Evaluation Status:	
Completed Date:		Evaluation Date:	07/30/1998
Application Detail		Find View All First 1 of 1 Last	
Effective Date:	01/01/1900	Effective Sequence:	
Academic Program:	LAU	Status:	Active in Program
Program Action:	Matriculat	Admit Term:	0330
Action Reason:		Action Date:	07/31/1998

Admission Application Detail page

Complete and Completed Date	Indicates whether the student's admissions application is complete and the date that the application was completed.
Evaluation Status and Evaluation Date	<p>The evaluation status of the student's admissions application and the date associated with this status.</p> <p><i>Complete:</i> The evaluation is complete.</p> <p><i>In Progress:</i> The evaluation is in progress.</p>

Application Detail

The Application Detail group box displays academic program data from the student's admissions application.

Effective Sequence	Distinguishes individual rows entered with the same effective date. This feature enables you to have admissions applications for each academic program for which the student applies. The system increases the sequence automatically, or you can enter a particular sequence number.
Status	The admissions status for the student in the specified academic program.
Program Action	Indicates the current action being taken in the admissions process.
Admit Term	The term in which the student was admitted to the academic program.
Action Reason and Action Date	The reason that and date on which the action was taken.

Selecting Your Application Data Source for Awarding

Specify whether you want to use federal application data (ISIR), institutional application data (PROFILE, Need Access, or an institutional application), or either (indicating which you would prefer to use if both are available). The application data source you select affects the packaging outcomes of Mass Packaging, Auto Packaging, and online manual awarding.

To allow the awarding and packaging of financial aid by using federal application data or institutional application data, you must enter a value in the Packaging Data Source field on the Financial Aid Defaults page, or override the installation level default for this field using an aid processing rule set at the academic career or academic program level. Select whether you want to use federal data, institutional data, or use a preference for federal or institutional data. For example, you could select the *Institutional then Federal* value for the packaging data source. If institutional application data is not available, the Packaging routine uses the student's federal application data to award monies.

The Packaging routine and the Equation Engine are affected by your selection of application data, either federal or institutional. The Packaging routine includes manual awarding, Auto Packaging, Mass Packaging, and the Mass Actions page. If you select an application type in the Packaging Data Source field that is different from the type of application that exists for a student, you cannot make awards for that student or adjust that student's awards. For example, if you select institutional application data as your packaging data source and the student has only federal application data, you cannot make awards for that student or adjust that student's existing awards.

Note. If the student does not have the specified packaging data source, the student does not receive any awards—except for *no effect* and conditional awards. For example, if you select *Federal Only* in the Packaging Data Source field and you only have institutional application data loaded for students, none of the students are awarded.

Depending on the packaging data source selected and the type of application available for a student, the and Equation Engine routines select data from either the federal application data (ISIR_** tables) or the institutional application data (INST_** tables). The data selected is then used to populate fields used by the Packaging and Equation Engine routines. Several fields selected from the ISIR_** tables do not have corresponding fields in the INST_** tables. Because of this, some packaging fields are populated with assumed values when you are packaging using institutional data. For example, database match information is not provided in the PROFILE application, so the student is assumed to have valid values for the database matches.

When the routine packages students using institutional data (Inst or Inst, Fed), it first determines whether an ISIR also exists for the student, in addition to the PROFILE, Need Access, or other institutional application in the system. Previously, if an ISIR existed for a student, the routine used ISIR data to determine federal eligibility and used institutional data for all other selection or eligibility criteria, such as packaging equations. Data for equations was selected when packaging data was selected. Now you must write your own equation to determine what data is selected. If only an institutional application and no ISIR exists for the student, the Packaging routine uses institutional data to determine eligibility—federal, institutional, or other—to package the student.

The following table provides a list of the packaging fields for which a corresponding field does not exist in the institutional application data (PROFILE, Need Access, or an institutional application). The second column tells you how the packaging field is populated when institutional application data is selected for use in packaging.

<i>ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field</i>	<i>How Packaging Fields are Populated when Institutional Data Source is used</i>
1ST_BACH_DEGREE	2-No is loaded (as an assumption).
DRUG_OFFENSE_CONV	1-Eligible is loaded (as an assumption).
FED_DEPEND_STAT	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.
FED_EFC	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.
FED_NEED	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.
INS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
NSLDS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
PRISONER_MATCH	0-Not Prisnr is loaded (as an assumption).
PRORATED _EFC	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.
GRADUATE_STUDENT	2-No is loaded (as an assumption).
SS_MATCH	Eligible — this information comes from the Student Aid Attributes table.
SS_REGISTRATION	Eligible — this information comes from the Student Aid Attributes table.
SSA_CITIZENSHIP_IND	Eligible — this information comes from the Student Aid Attributes table.

<i>ISIR Fields Used in Packaging Routine with no Corresponding INST (PROFILE) field</i>	<i>How Packaging Fields are Populated when Institutional Data Source is used</i>
SSN_MATCH	Eligible — this information comes from the Student Aid Attributes table.
TITLEIV_ELIG	Y-Yes is loaded (as an assumption).
WEEKLY_PC	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.
WEEKLY_SC	Field values are derived from available institutional application (PROFILE, Need Access, or an institutional application) data or an INAS calculation.

Note. The fields FED_DEPEND_STAT and INST_DEPEND_STAT are populated from federal and/or institutional data load processes and are on the STUDENT_AID table. The Packaging routine references these values to determine dependency status.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117

Entering Veteran Education Benefits

The Packaging routine is able to include and exclude Montgomery GI Bill (Chapter 30)/AmeriCorps (Title 1) veteran education benefits based on the following criteria when awarding federal financial aid. This veteran education benefits amount must be used as follows:

- Considered as a resource, which reduces need, when awarding campus-based programs—SEOG, Federal Work Study, and Perkins.
- Excluded when determining a student's eligibility (does not reduce need) for a subsidized loan—FFELP or Direct.
- Considered as estimated financial aid for an unsubsidized loan—FFELP or Direct.

The Packaging routine then uses this amount when determining need and estimated financial aid for awarding. The Need Summary pages also display the veteran education benefits amount.

This section discusses how to:

- Enter other educational resource information.
- Process other educational resources.

Page Used to Enter Veteran Education Benefits

Page Name	Definition Name	Navigation	Usage
Veteran's Education Benefits	STDNT_AWD_PER_RSRC	Financial Aid Awards, Award Processing, Identify Education Resources, Veteran's Education Benefits	Enter the amount a student receives from the Montgomery GI Bill/AmeriCorps programs for all appropriate award periods.

Entering Other Educational Resource Information

Access the Veteran's Education Benefits page (Financial Aid Awards, Award Processing, Identify Education Resources, Veteran's Education Benefits).

Veteran's Education Benefits

Johnathan Thompson ID: FA0373

Aid Year: 2005 Financial Aid Year 2004-2005 Institution: PSUNV

EFC Status: Unofficial [ISIR Information](#) [Database Matches](#)

Award Period: Academic	Montgomery GI Bill/AmeriCorps: <input type="text" value="1,000"/>	<input type="checkbox"/> Print as Other Resource
Award Period: Non Standard	Montgomery GI Bill/AmeriCorps: <input type="text" value="0"/>	<input type="checkbox"/> Print as Other Resource

Veteran's Education Benefits page

EFC Status (expected family contribution status) Displays the student's ISIR EFC status. Values are *Unofficial*, *Official*, and *Rejected*.

ISIR Information Click this link to access the ISIR Information page and view selected information from the student's ISIR.

Database Matches Click this link to access the Database Matches page and review the student's status regarding the U.S.E.D. required database matches.

Award Period Indicates the award period associated with the veteran education benefit amount you are entering.

Montgomery GI Bill/AmeriCorps

Enter the amount the student is being awarded for veteran education benefits. The Packaging process uses the veteran education benefits amount you enter. This amount reduces need for campus-based awarding, is excluded from consideration when awarding subsidized loans (FFELP or Direct), and is included as estimated financial aid when awarding unsubsidized loans—FFELP or Direct. The amounts that you enter are specific to each award period.

Print as Other Resource

Select this check box if you want the amount that you enter to print on the Financial Aid Notification (FAN) letter as *Other Resource*. If you do not select this check box, the veteran education benefits amount does not appear on the FAN letter.

Processing Other Educational Resources

The Packaging process uses the veteran education benefits amount in the following way:

- It reduces need for campus-based awarding.
- It is *not* included in the need calculation for the awarding of subsidized loans—FFELP or Direct.
- It is included as estimated financial aid for unsubsidized loans—FFELP or Direct.

These rules are used during Manual Packaging, Auto Packaging, and Mass Packaging.

Note. Packaging treats the veteran education benefits amount exactly the same for federal methodology (FM) and institutional methodology (IM) processing. Only one entry exists on the Student Aid Attribute record for the veteran education benefits amount. The Need Summary pages display the same amount in both the FM and IM columns.

You enter veteran education benefits amounts for both academic and non standard award periods. Be sure to divide the veteran education benefits amount correctly between award periods. During packaging, if the Award Period value on the packaging plan is *Both*, then the Packaging process adds the two award period values and uses that amount when assessing need.

If you modify the award period on the student's Term Budget record—for example, from academic to non-standard—and that student has veteran education benefits, you receive this award message: *This student has 'Other Resources' associated with this Award Period. Please check the distributions as this change may affect the student's resources/need calculation.* You must change the amount entered for the veteran education benefits to derive the appropriate amount for each award period.

Note. When the system is determining a student's eligibility for a particular award, eligibility is based on the student's period of enrollment rather than the student's loan period. If you want to calculate a one-term only loan, you must adjust/prorate the student's veteran education benefits amount accordingly.

Reviewing the Student's Packaging Status

The Packaging Status Summary page provides a summary of the wide variety of information the Packaging routine uses. It includes federal and institutional verification status, disbursement hold, satisfactory academic progress, and packaging information. Other processes or actions affect many of the fields on this page. You can change these fields either manually or using Mass Change.

This section discusses how to:

- Review the Packaging Status Summary page.
- View database matches.
- Review the U.S.E.D. database match process.
- Review Pell information.
- Override Pell eligibility calculation setup values.




Pages Used to Review the Student's Packaging Status

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	Review a comprehensive summary of a student's financial aid application and award information.
Financial Aid Term (inquiry)	STDNT_FA_TERM_SEC	Click the TERM link on the Packaging Status Summary page or the FA Term link on the Student Budget Maintenance page.	View the student's Financial Aid Term information.
Statistics (inquiry)	STDNT_FA_TERM_SEC1	Click the Statistics link on the Financial Aid Term page.	View the student's GPA related information (including term and cumulative GPA), units taken and passed, and terms in residence.
Form of Study	STDNT_FA_TERM_SEC2	Click the Form of Study link on the Financial Aid Term page.	View information relating to a student's exchange program.
ISIR Information	ISIR_INFO_SMR2_SEC	Click the ISIR Information link on the Packaging Status Summary page or the ISIR link on the Veteran's Education Benefits page.	View select information from the student's most recently loaded ISIR and information from Campus Community.

Page Name	Definition Name	Navigation	Usage
ISIR Comments	ISIR_SMR2_CMNT_SEC	Click the comment code on the ISIR Information page.	View the text of the ISIR comment and the severity of the comment code.
Database Matches	ISIR_DBMATCH_SEC	Click the Database Matches link on the Packaging Status Summary page or the Veteran's Education Benefits page.	View database matches. Review or manually override a student's status for the U.S.E.D. federally required database matches (populated by the ISIR data load process).
Need Summary	NEED_SMRY_PKG_SEC	Click the Need Summary link on the Packaging Status Summary page.	View the student's cost of attendance and need, calculated with both federal and institutional methodologies.
PELL Information	PELL_INFO_SEC	Click the PELL link on the Packaging Status Summary page.	Review Pell information or initiate Pell Payment processing for a student if they have received a Pell Grant. Update the Pell Processing Status field.
Student Override	STDNT_PELL_PKG_SEC	Click the PELL Calculation Override link on the Packaging Status Summary page.	Override your institutional Pell eligibility calculation setup for a student.
Restricted Aid Information	STDNT_RSTRCAID_SEC	Click the Restricted Aid link on the Packaging Status Summary page.	View the status and amount of the student's restricted aid award.
Financial Aid Award	STDNT_AWRD_CTG_SEC	Click the Financial Aid Awarded link on the Packaging Status Summary page.	View the student's financial aid awards. Determine whether the student's awards have been disbursed to the student.
Student SAP	SFA_SAP_STDNT	Click the SAP Details link on the Packaging Status Summary page.	View the student's Satisfactory Academic Progress details, such as attempted and earned units or current and cumulative GPA.

Reviewing the Packaging Status Summary Page

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).

Packaging Status Summary	
Bonnie Gilly	ID: FAEA1020
Aid Year: 2007 Financial Aid Year 2006 - 2007	Institution: PSUNV
  	
EFC Status: Official	TERM ISIR Information Database Matches Need Summary PELL PELL Calculation Override
Counselor:	<input type="text"/>
Academic Career:	UGRD <input type="text"/> Undergraduate
Aid Processing Status:	Applied <input type="text"/>
Aid Application Status:	Active <input type="text"/> *Satisfactory Academic Progress: Undetrmine <input type="text"/> SAP Details
Review Status:	Incomplete <input type="text"/> Disbursement Hold: <input type="text"/>
INST Verification Status:	Non Select <input type="text"/> Loan Entrance Interview Status: <input type="text"/>
Verification Flag:	Required <input type="text"/> Exit Interview: <input type="text"/>
Verification Status:	Not Select <input type="text"/>
Scholarship Status:	Not Eval <input type="text"/> Award Notification
*Aid Packaging Method:	Not Pkgd <input type="text"/>
Packaging Plan ID:	<input type="text"/>
Repackaging Plan ID:	<input type="text"/>
Aggregate Source:	Default <input type="text"/>
Aggregate Used:	

Self Service
 Award Access: Allowed
☒ Inquiry Access
☒ External Award Access

Packaging Status Summary page

EFC Status (expected family contribution status) Displayed from the financial aid application data. The student's EFC can be *Official*, *Rejected*, or *Unofficial*.

TERM Click this link to access the Financial Aid Term page and view Financial Aid Term information.

ISIR Information Click this link to access the ISIR Information page and view some of the student's ISIR information.

Database Matches Click this link to access the Database Matches page and review a student's status regarding the U.S.E.D. required database matches.

Need Summary Click this link to access the Need Summary page and view the student's need summary information calculated with both federal and institutional methodologies.

PELL Click to access the PELL Information page and view Pell information or to initiate Pell Payment processing for a student if they have received a Pell Grant.

PELL Calculation Override Click this link to access the Pell Eligibility Calculation - Student Override page and override your institution's Pell eligibility calculation values for this student.

Counselor Name	Enter a financial aid counselor's ID in this field if a particular counselor is assigned to the student.
Restricted Aid	This link appears only if the student has restricted aid information entered on the Restricted Aid page. Click to access the Restricted Aid Information page and view the status and amount of the student's restricted aid award.
Financial Aid Awarded	This link appears when the student has one or more financial aid awards. Click to access the Financial Aid Awards page and view the student's financial aid awards.
Academic Career	This value is entered with the first ISIR load and is not changed by subsequent ISIR loads. If the student has multiple careers, the settings that you establish on the Prospect Source Cross Reference Setup page determine the career entered in this field. Update this field by selecting the correct career for the student. The value in this field is automatically updated after the student has been packaged.
Aid Processing Status	<p>Indicates where the student is in the Awarding process. You can also update this status using the Package Status field on the award entry pages.</p> <p>Use this field in Mass Packaging to determine whether students are ready to be packaged. The Disbursement Authorization routine also uses this field to determine whether a student's package is complete, if you select the Package Complete check box on the Disbursement Rules: Global - Indicators page or the Disbursement Rules: Item Type - Indicators page.</p> <p><i>Applied:</i> The student has applied for financial aid. This value is automatically populated when you load a financial aid application like an ISIR, a PROFILE application, or an institutional application.</p> <p><i>No Electronic Application:</i> No electronic application has been received.</p> <p><i>Packaging Completed:</i> The student's award package has been posted. The Posting routine automatically updates the field to this value. To repackage a student after their status has been changed to <i>Packaging Completed</i>, use Manual or Auto Packaging or set up a Mass Packaging query definition to select students with a status of <i>Packaging Completed</i>.</p> <p><i>Ready for Counselor Review:</i> The student should be or is currently being reviewed by a financial aid counselor.</p> <p><i>Ready for Packaging:</i> The student is ready for packaging. When you select students for Mass Packaging, you may want to choose only students whose status is set to this value; otherwise, any student who meets the Mass Packaging query definition is selected regardless of aid processing status.</p> <p><i>Repackage:</i> The student is ready for repackaging. Can be set by the External Award Load process.</p>

Aid Application Status	<p>Indicates whether the student's financial aid application is available for financial aid processing.</p> <p><i>(none)</i>: You have not assigned the student's financial aid application a status. You cannot access certain pages until you enter a status.</p> <p><i>Active</i>: The student's financial aid application is active for financial aid processing. The system assigns this value automatically when you load the student's first ISIR into the system.</p> <p><i>Canceled</i>: You have canceled the student's financial aid application. You must enter this value manually.</p> <p><i>Restricted</i>: The student has applied for restricted aid only. You must enter this value manually.</p>
Satisfactory Academic Progress	<p>Indicates whether the student is meeting satisfactory academic progress (SAP). The Packaging routine uses this field to determine whether to award federal aid to the student. The Satisfactory Academic Progress global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, CommonLine Disbursement Hold and Release processing uses this field to determine whether a hold should be placed on the student's CommonLine loan.</p> <p><i>Meets SAP</i>: The student is meeting satisfactory academic progress. This value allows federal awards to be made, the student's award to be authorized, and does not cause a hold to be placed on the student's CommonLine loan.</p> <p><i>Not Meet</i>: The student is not meeting SAP. Federal awards are not made, a student's award is not authorized, and a hold is placed on the student's CommonLine loan when this value is selected.</p> <p><i>Probation</i>: A student's award is authorized and no hold is placed on the student's CommonLine loan when this value is selected.</p> <p><i>Undetrmine (undetermined)</i>: SAP is undetermined or has not been calculated. Federal awards are not made, a student's award is not authorized, and a hold is placed on the student's CommonLine loan when this value is selected.</p>
SAP Details	<p>Click on this link to view the Student SAP page.</p>
Review Status	<p>Indicate the status of the review if your institution conducts a review of the student's financial aid application.</p> <p><i>(none)</i>: Indicates that your institution does not conduct a review.</p> <p><i>Complete</i>: The review of this application has been completed.</p> <p><i>Incomplete</i>: This application is awaiting a review.</p>

Disbursement Hold

Enables you to place a hold on the student's awards that is specific to disbursement processing. You can opt to hold authorization/disbursement of financial aid if a hold is present.

(none): No holds are placed on this student's financial aid.

Fed Aid (federal aid): Places a hold on the authorization/disbursement of federal aid only.

Institut. (institutional): Places a hold on the authorization/disbursement of institutional aid only.

Loan Hold: Places a hold on the authorization/disbursement of loans.

INST Verification Status
(institutional verification status)

Indicates the status of your verification process if your institution conducts a verification of the student's financial aid application. You must set these values manually if you want to use them in the verification process.

(none): Indicates that your institution does not conduct an institutional verification.

Doc Select: The student has been selected for institution verification of a document only.

Non Select: The student has not been selected for institutional verification.

Select: The student has been selected for institutional verification.

Loan Entrance Interview Status

Indicates whether the student has completed a loan entrance interview for the corresponding aid year. If you select the Loan Entrance Intervw Req (loan entrance interview required) check box on the Disbursement Rules: Item Type - Indicators page, the interview status value affects how the authorization process treats the student's award.

(blank): The authorization process automatically determines whether the student has satisfied the loan entrance counseling requirement using the process activated when you select the Loan Entrance Intervw Req check box.

Complete: The student has completed a loan entrance interview. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized. Set this value after confirmation of the student's completion of loan entrance counseling.

Inst Req (institution required): Your institution requires the student to have a loan entrance interview, regardless of whether the authorization process requires an interview for loan awards. If the Loan Entrance Intervw Req check box is selected, the authorization process fails until you reset the status to *Complete* or *Pending*. Students with prior loan history also fail authorization until you reset the status to blank, *Complete*, or *Pending*.

Pending: The student's loan entrance interview is pending. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized.

Verification Flag

Indicates the status of the Department of Education's verification requirement for this student. You can choose to hold Authorization/Disbursement of financial aid if the status is not *Complete* by selecting the Verification Complete check box on the Disbursement Rules Global page.

(none): This value is treated the same as the *Not Reqd* value.

Complete: Indicates that you have completed verification either manually or by the Auto Verification process.

Not Reqd (not required): The student has not been selected for verification by the Department of Education. This is the default value for this field.

Pending: The student has failed Auto Verification. This value is automatically populated by the Auto Verification process.

Required: The student has been selected for verification. This value is automatically populated when you load the student's ISIR data.

Exit Interview

Indicates whether the student has completed a loan exit interview for the corresponding aid year. This field is for informational use only because no delivered process currently uses the value of this field.

Complete: The student has completed a loan exit interview.

Inst Req (institution required): Your institution requires the student to have a loan exit interview.

Pending: The student's loan exit interview is pending.

Verification Status

This is associated with the awarding of federal funds, including Pell Grants, Stafford loans, and Direct Loans. It indicates the code you use when reporting a Pell payment made to a student.

Accurate: Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually.

Calculated: Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed.

Not Select: The student was not selected for verification.

Not Verfd (not verified): Indicates that a student was selected for verification but was not verified.

Reprocess: Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01.

Tolerance: Indicates that a student's verification passed within the tolerance level.

Wtht Doc (without documentation): Indicates that the first Pell payment was made to the student before verification was completed. You can only use this value for one Pell payment. Subsequent payments/disbursements require reporting a different verification status.

Scholarship Status	<p>Identifies whether you have evaluated a student for scholarship funds. This is an information only field. It does not affect the Packaging process.</p> <p><i>Evaluated:</i> You have evaluated the student for scholarship funds.</p> <p><i>Not Eval</i> (not evaluated): You have not evaluated the student for scholarship funds.</p>
Award Notification	<p>Click this link to access the FE Award Notification Detail page.</p>
Aid Packaging Method	<p>The method used to create the student's financial aid package. The values in this field are automatically updated.</p> <p><i>Auto:</i> Packaged using Mass Packaging. View the packaging plan used to package the student in the Packaging Plan ID field.</p> <p><i>Counselor:</i> A financial aid counselor packages the student manually or using Auto Packaging. If Auto Packaging is used, view the packaging plan used to package the student in the Packaging Plan ID field.</p> <p><i>Not Pkgd</i> (not packaged): Not yet packaged. This is the default value until you manually change it.</p>
Packaging Plan ID	<p>If you use Auto Packaging or Mass Packaging to package the student, this field identifies the packaging plan used to package the student. The Mass Packaging process populates this field when it is run in live mode. When Auto Packaging is used, the Posting routine populates the packaging plan ID.</p>
Repackaging Plan ID	<p>If you use Auto Repackaging or Repackaging, this field identifies the repackaging plan used. The Repackaging process populates this field when it is run in live mode. When Auto Repackaging is used, the Posting routine populates the repackaging plan ID.</p>
Aggregate Source	<p>Identifies and defines the aggregate source that the Awarding and Packaging process uses directly. Prior to any awarding or packaging, this identifies the default value for manual, auto, or mass packaging. You can also change the aggregate source on any of the awarding pages. If online awarding or packaging is already complete, the value here represents the aggregate source used during the Packaging routine.</p> <p><i>Default:</i> Identifies aggregate source to be used based on value defined on FA Installation Defaults.</p> <p><i>NSLDS:</i> Indicates that awarding and packaging uses the NSLDS aggregate totals.</p> <p><i>PS:</i> Indicates that awarding and packaging uses the PeopleSoft generated and maintained aggregate totals.</p>
Aggregate Used	<p>Indicates the aggregate source used during packaging.</p> <p><i>NSLDS:</i> Indicates NSLDS aggregate totals used.</p> <p><i>PS:</i> Indicates PeopleSoft generated and maintained aggregate totals used.</p>

Self Service

- Award Access** Displays the result of how you set up the Self-Service Access page. Values are *Allowed* or *Denied*.
- Inquiry Access** Select this check box to allow a student to view assigned financial aid awards.
- External Award Access** Select this check box to allow a student to report awards from other sources.

See Also

Chapter 15, "Setting Up Disbursement Rules," Defining Basic Global Rules for Authorization, page 449

Chapter 36, "Processing CommonLine Loans," Managing Disbursement Hold and Release Processing, page 1364

Chapter 25, "Assessing Eligibility for Financial Aid," Working with Auto Verification, page 817

Chapter 27, "Preparing for Awarding and Packaging," Awarding Restricted Aid, page 974

PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, "Setting Up Financial Aid Self-Service," Setting Up Self-Service Inquiry Options

PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, "Setting Up Financial Aid Self-Service," Setting Up Self-Service Awarding Options

Viewing Database Matches

Access the Database Matches page (click the Database Matches link on the Packaging Status Summary page or the Veteran's Education Benefits page).

Match Values	Override
SSN Match:	<input type="checkbox"/>
SSA Citizenship Indicator:	<input type="checkbox"/>
DHS/INS Match:	<input type="checkbox"/>
Sec DHS/INS Match Flag:	
VA Match:	<input type="checkbox"/>
Selective Service Match:	<input type="checkbox"/>
Selective Service Registration:	<input type="checkbox"/>
NSLDS Match:	<input type="checkbox"/>
Prisoner Match:	<input type="checkbox"/>
Drug Offense Conviction:	<input type="checkbox"/>
Father's SSN Match:	<input type="checkbox"/>
Mother's SSN Match:	
Dept of Defense Match:	<input type="checkbox"/>
<input type="checkbox"/> PLUS Override <input type="checkbox"/> HEAL Eligible	
<input type="checkbox"/> Title IV Fund Eligibility <input type="checkbox"/> PreProfessional Coursewrk	
<input type="checkbox"/> Special Circumstances Flag	

Database Matches page

The database match values on this page are display only. The Validation routine uses these values to determine whether the student is eligible for federal financial aid using previously defined eligibility rules. If you want to change the federally reported database match value to allow a student to receive federal aid, you must submit a history correction. When that history correction has been resolved and a Correction ISIR has been received by your institution, the database match field in question contains the resolved value. As a result, you can process the student for federal aid. If you want to award the student federal aid prior to receiving the revised Correction ISIR, you must select the Override check box.

The system enforces additional federal database edits for the following existing database matches:

- Student's Social Security Number match with SSA: student's date of birth inconsistent with SSA records.
- Veteran Status match with Veteran Affairs: independent due to VA status.

During packaging, the system performs the database match edits in the following sequence:

1. SSN Match
2. SSA Citizenship

3. DHS (formerly INS) Match
4. VA Match
5. Selective Service Match
6. Selective Service Registration
7. NSLDS Match
8. Drug Offense Conviction
9. Parent SSN Match

The system checks the first database match in the sequence (SSN Match) and determines whether or not resolution is required. When it encounters a database match that needs resolution, it does not perform any additional database match checks until the match in question is resolved. After you resolve the database match issue, the system then checks the next database match in the sequence. For example, if a student has three database match problems, the system does not perform all three checks at the same time. It starts serially with the first one. If the match is good, it moves to the next match. If the next one is not good, the system does not perform any more database checks until that database match is resolved.

Important! When you override a federally reported database match value, your institution assumes full responsibility for changing these values.

Override

Select the check box next to a database match value to override the federally reported match value. This indicates that you have made a professional judgement decision and want the system to award and disburse federal financial aid for this student.

If you want override a federally reported database match value for a group of students, you can use Mass Change to select the Override check box.

SSN Match (social security number match)

If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: SSN match code indicates student is not federally eligible.*

Date of Dt (date of death): According to the Social Security Administration (SSA), the SSN the student provided belongs to a deceased person. The Validation routine does *not* allow you to award federal financial aid to this student.

Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Match: The SSA found a match for the student's SSN. The Validation routine allows you to award federal financial aid to this student.

Mismatch: The student's date of birth or name did not match the SSA's records for the SSN. The Validation routine does *not* allow you to award federal financial aid to this student.

No DOB: No match was conducted because the student did not provide date of birth information. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide date of birth information on the SAR.

No Match: The SSA did not find a match for the student's SSN. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA.

No Name: No match was conducted because the student did not provide his or her first or last name, or both. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must provide both first and last name on the SAR.

Not Sent: No match was conducted because the SSN provided by the student did not fall within the valid range of SSNs. The Validation routine does *not* allow you to award federal financial aid to this student. To be eligible to receive federal funds, the student must correct the SSN on the SAR, submit a new FAFSA with the correct SSN, or contact the SSA.

SSA Citizenship

Indicator (social security administration citizenship indicator)

If you try to award federal monies to the student for the field values that do not allow you to award federal financial aid, the Validation routine returns a zero award amount and the following award message: *DB Match: SSA Citizenship Indicator denotes student is not Federally eligible.*

Alien/cond: The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

Alien/stud (alien student): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

foreign bn (foreign born): The student was born in a foreign country to American parents who were stationed in another country. The student must provide of citizenship, such as a birth certificate indicating that the student is a U.S. citizen born abroad to be eligible for federal financial aid. The Validation routine allows you to award federal financial aid to this student.

LA/wk elig (legal alien, work eligible): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

LA/wkinelg (legal alien, work ineligible): The student is not a U.S. citizen. The Validation routine does *not* allow you to award federal financial aid to this student.

Name/DOB: The SSA was unable to verify the student's citizenship because there was no match on SSN, name, or date of birth. The Validation routine does *not* allow you to award federal financial aid to this student. To receive federal financial aid, the student must make corrections to Social Security Number, name or date of birth on the SAR or submit a new FAFSA with the correct information. If the student believes the provided information is correct, the student must contact the Social Security Administration and provide documentation that verifies citizenship status.

Other: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

U.S. Citiz (U.S. citizenship): The SSA confirmed the student's U.S. citizenship status. The Validation routine allows you to award federal financial aid to this student.

DHS/INS Match Flag (Department of Homeland Security / Immigration and Naturalization Service match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: INS match code indicates student is not federally eligible.*

Values are:

Confirmed: The INS confirmed the student's non-citizen eligibility. The Validation routine allows you to award federal financial aid to this student.

Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Mismatch: The INS match was not conducted, because the student did not indicate citizenship status, the student changed from eligible non-citizen to citizen or changed the Alien Registration Number, or the student did not provide a valid Alien Registration Number. The Validation routine does *not* allow you to award federal financial aid to this student.

Not Conf (not confirmed): The INS did not confirm the student's eligible non-citizenship status. The Validation routine uses the value of the Sec INS Match Flag field to determine whether to award federal financial aid to this student.

Sec DHS/INS Match Flag (secondary Department of Homeland Security / Immigration and Naturalization Service match flag)

Values are:

Pending: Automated secondary confirmation in progress. The Validation routine does *not* allow you to award federal financial aid to this student.

Confirmed: Citizenship confirmed. The Validation routine allows you to award federal financial aid to this student.

Not yet: In continuance. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must wait another 10 days for an updated ISIR or send copies of the student's proof of eligibility to the INS.

Not Conf (not confirmed): Citizenship not confirmed. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS.

No info: INS needs more information. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, your institution must send copies of the student's proof of eligibility to the INS.

VA Match (veteran's administration match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: VA match code indicates student is not federally eligible.*

Active Dty (active duty): Record found on VA database but applicant is on active duty. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Confirmed: Veteran status confirmed. Student is eligible for federal aid.

No Qualify: Record found on VA database but the student is not a qualifying veteran. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Not Found: Record not found on VA database. If the student's ISIR record has a SAR C code, the Validation routine does *not* allow you to award federal financial aid to this student. If the student's ISIR record does not have a SAR C code, then the Validation routine allows you to award and disburse federal financial aid to this student.

Not Sent: Record not sent for match. Student is eligible for federal aid.

Selective Service Match

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Selective service match code indicates student is not federally eligible.*

Note. When awarding a student whose gender is defined as female in Bio/Demo data, this field has no bearing on awarding federal financial aid.

Exempt: Student is within 45 days of his birthday, and is temporarily exempt because the student is not yet 18 years old. An update is not required during the year. The Validation routine allows you to award and disburse federal financial aid with this field value.

Mismatch: The student could not be registered with Selective Service, because the student is not between the ages of 18 and 26 or information needed to register the student is missing.

Not Conf (not confirmed): The student is not registered with the Selected Service. The Validation routine does *not* allow you to award federal financial aid to this student. To become eligible for federal financial aid, the student must register with Selective Service, present appropriate registration that he is already registered, or qualify for a waiver or exemption.

Reg Conf (registration confirmed): Match conducted and the applicant's registration status is confirmed by the Selective Service. The Validation routine allows you to award and disburse federal financial aid with this field value.

Ret Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Selective Service Registration

Values are: *Exempt*, *Late*, *Mismatch*, *Not comp* (not completed), and *Reg Conf* (registration confirmed).

NSLDS Match (National Student Loan Data System Match)

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: NSLDS match code indicates student is not federally eligible.*

Def/Ovrpay (default/overpayment): A match for the student was found, and the student has at least one loan in default and owes at least one overpayment. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Default: A match for the student was found, and the student has at least one loan in default. The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Eligible: A match for the student was found, and the student's NSLDS data is sent. The Validation routine allows you to award and disburse federal financial aid with this field value.

Init/Late: See U.S.E.D. "A Guide to <Aid Processing Year> ISIRs, Appendix B" Database Matches and Match Flags.

Mismatch: A match for the student's SSN was found, but neither name nor date of birth matched. No NSLDS data is sent. You must access NSLDS online using SSN only to retrieve the matching data and determine whether the record belongs to the student. If the record belongs to the student, you must determine whether the student is eligible for federal financial aid. If the record does not belong to the student, the student is eligible for federal financial aid.

No Data: No match for the student was found. The student does not have NSLDS data. The Validation routine allows you to award and disburse federal financial aid with this field value.

Not Sent: A match for the student was found, but no NSLDS data was sent to the CPS. The Validation routine allows you to award and disburse federal financial aid with this field value.

Overpayment: A match for the student was found, and the student has received at least one overpayment of federal student aid funds (Pell Grant, FSEOG, or Perkins). The Validation routine does *not* allow you to award and disburse federal financial aid with this field value.

Partl Elig (partially eligible): A match for the student was found, and the student has received a total amount of student loans that is close to the loan limits established for the federal loan programs. The Validation routine allows you to award and disburse federal financial aid with this field value, but use caution to ensure that the student does not exceed his or her loan limits with subsequent Title IV loans.

Prisoner Match

This database match indicates a student's incarcerated status. If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Prisoner match code indicates student is not federally eligible.*

Note. When processing awards using institutional data (not ISIR data), the Packaging process uses the *Not Prisnr* (not a prisoner) value for this database match.

Values are:

Blank: The system does *not* allow you to award federal financial aid to this student.

Local: The student is incarcerated in a local facility. The student is *not* eligible for federal loans but is eligible for other federal financial aid. If a federal loan is awarded to the student, the amount is reduced to zero by the Validation process, and an award message indicates the reason for the zero amount.

Not conduc (not conducted): The student's record was sent but the database match was not conducted. The Validation routine does *not* allow you to award federal financial aid to this student.

Not Prisnr (not a prisoner): The student is not incarcerated in a state or federal prison. The Validation routine allows you to award and disburse federal financial aid with this field value.

Not sent: The student's record was not sent for a prisoner database match. If the student's name or date of birth is missing, the Validation routine does *not* allow you to award federal financial aid to this student. If the student is a Pacific Islander and the student's SSN begins with 888, the Validation routine allows you to award and disburse federal financial aid to this student.

State/Fed (state/federal): The student is incarcerated in a state or federal facility. The Validation routine does *not* allow you to award federal financial aid to this student.

Drug Offense Conviction

This database match indicates the student's status relative to drug offense convictions due to either *drug abuse debarment and suspension activity* or *terms of the Anti-Drug Abuse Act of 1998*. The student can be ineligible for federal financial aid due to a drug offense conviction or pending activity.

If you try to award federal monies to the student for the field values that do *not* allow you to award federal financial aid, the system returns a zero award amount and the following award message: *DB Match: Drug Offense Conviction match code indicates student is not federally eligible*.

Note. When processing awards using institutional data (not ISIR data), the Packaging process uses the *1 – Eligible* value for this database match.

Values are:

Blank: no value in this field plus a SAR C flag means the system does *not* allow you to award federal financial aid to this student.

1 – Eligible: The student is eligible for federal financial aid. The system allows you to award and disburse federal financial aid with this field value.

2 – Partially Eligible: The student becomes eligible for federal financial aid during the award year. The period of eligibility depends on the type of aid. For loans, the student becomes eligible for loans during the Loan Period. For all other aid, the student becomes eligible at the beginning of the term for which the student was cleared of the drug offense conviction.

The system treats the student as fully eligible for all term/disbursement periods. It is your responsibility to limit the student's eligibility to a specific term/disbursement period as needed. When a federal aid award is made, the full award amount is awarded and the following Award Message is displayed: *DB Match: Drug Offense Conviction match equals '2 - Partially Eligible'. Verify the amount of this award to ensure proper term/loan period eligibility*.

3 – Ineligible: The student is not eligible for federal financial aid due to the student's current or pending drug conviction activity. The system does *not* allow you to award federal financial aid to this student.

Father's SSN Match and Mother's SSN Match

The system performs an eligibility check on each parent's social security number match based on the Database Matches and Match Flags specifications. If either of the match flag values for the parents' social security numbers results in a failed match with SSA, the student does not receive federal aid.

On the Database Matches page, despite there being two SSN Match fields for the mother and father, only one Override check box exists for the parents' SSN match. The Override check box controls both. If the father's social security number is a match and the mother's is not or vice versa, or both mother and father are not a match, and if you select the Override check box for the parents' SSN match override field, the system considers the match to be good and awards the student federal aid.

Note. When you override a federally reported database match value, your institution assumes full responsibility for changing these values.

Dept of Defense Match	Select to identify the student as a child of a post-9/11 deceased military service member. Once selected, use the Professional Judgment component to award the student all Title IV funding as eligible, either as a Pell-eligible (zero EFC) or not Pell-eligible (original EFC) candidate.
PLUS Override	Select to identify a dependent undergraduate student who is eligible for additional Unsubsidized Stafford Loan because his or her parents are deemed a credit risk or for professional judgement reasons. If you select this check box, the Packaging process does not award a PLUS loan and allows a dependent undergraduate student to become eligible for additional Unsubsidized Stafford Loan funds. This field also displays on the aggregate aid summary components, for aggregate areas that correspond to either the FFELP or Direct Loan programs.
Title IV Fund Eligibility	<p>Select to identify the student as eligible for Title IV funds. If the check box is cleared, no federal aid is awarded to the student.</p> <p>This field is evaluated when an ISIR is received for the student and is cleared if error code 19 is reported on the ISIR.</p>
Special Circumstances Flag	Select if the student's Special Circumstances Flag = 4, Dependent record unsubsidized loans only. Use the Professional Judgment component to award this rejected dependent student an unsubsidized loan.
HEAL Eligible and PreProfessional Coursework	<p>Select to increase Stafford loan limits for eligible health professional or preparatory coursework candidates.</p> <hr/> <p>Note. Packaging and Repackaging processes do not automate the awarding of an additional Unsubsidized Stafford amount based on a student participation in an eligible health profession program or preparatory coursework program. Additional Unsubsidized Stafford amounts must be awarded from the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement).</p> <p>If a Direct Loan Unsubsidized Stafford award is based on participation in an eligible health professional program or preparatory coursework, you must select the relevant check box here on the Database Match page before you build the Direct Loan origination application record. Indicators are carried forward to the Direct Loan origination application record for COD reporting.</p> <p>The HEAL Eligible and PreProfessional Coursework check boxes have no impact on the Packaging and Repackaging components and are used only by Direct Loan COD reporting for Unsubsidized Stafford loans.</p> <hr/>

Reviewing the U.S.E.D. Database Match Process

To evaluate database matches, Campus Solutions uses the ISIR Comment table as the basis for determining the student's eligibility for federal aid. Administrators can control eligibility through the severity level value assigned to an ISIR comment. The system compares ISIR comments on the student's record to the ISIR Comment table and evaluates eligibility for federal aid based on that database match.

The DB Match Use value in the ISIR Comment table corresponds to a U.S.E.D. database match. Each comment is associated with a severity level. The severity level associated with the DB Match Use field effects how the system handles the database match during packaging.

Severity levels are pre-defined according to the combination of the database match value, ISIR comments, and the presence of reject codes and SAR C flag. The values are as follows:

Severity Level	Resolution
0	Ignore. Requires no action. Federal aid can be awarded.
1	Action required. Indicates a reject condition exists for the assigned DB Match Use value. Federal aid cannot be awarded. Database match needs resolution.
2	Action required. Indicates SAR C on file. Federal aid cannot be awarded. Database match needs resolution.

Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the DB Match Use field is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

Note. The DB Match Use and SAR C Flag values are set based on the most recent ISIR record loaded for the aid year.

Examples of ISIR Comment Codes, Severity Level, and DB Match Use

Access the ISIR Comments page (click the comment code on the ISIR Information page).

The screenshot displays the 'ISIR Comments' page. At the top, there are tabs for 'ISIR Reject Reasons' and 'ISIR Comments'. Below the tabs, the 'Aid Year' is set to 2005 (Financial Aid Year 2004-2005) and the 'Institution' is PSUNV. The main section is titled 'ISIR Comment Codes' and contains a table with the following data:

*Code	Description	Severity Level	DB Match Use
007	As we previously indicated, the date of birth you reported for your father does not match the Social Security Administration's (SSA)	0 Ignore	
008	As we previously indicated, the date of birth you reported for your mother does not match the Social Security Administration's (SSA)	0 Ignore	
009	We cannot process your application further because of issues raised by terms of the Anti-Drug Abuse Act of 1988. For information	1 Action Required	08 Drug Offense Conviction Match
010	For additional information about your FSEOG overpayment, your Financial Aid Administrator must access NSLDS.	2	07 NSLDS Match
011	The Social Security Administration (SSA) did not confirm that the social security number you reported for your father on your financial	1 Action Required	09 Parent SSN Match

ISIR Comments page

See [Chapter 21, "Defining Application Processing Options," Setting Severity Levels for ISIR Comment Codes, page 581.](#)

Reviewing Pell Information

Access the PELL Information page (click the PELL link on the Packaging Status Summary page).

PELL Information

Pell Processing Status:

Reported

Transaction Nbr:

Effective Date:

Effective Sequence:

0

Academic Career:

Primary Academic Program:

Academic Plan:

☐ Use Fulltime Enrollment

☐ Originate Offered Awards

☐ Originate Max Pell Award

☐ Pell Student Level Override

Low TE Flag:

Academic Calendar:

Payment Methodology:

Hours/Credits in Acad Year:

Weeks in Program Acad Year:

Incarcerated Code:

PELL Information page

The fields on this page are populated when Pell data, from the ISIR, is loaded in the system.

Pell Processing Status	<p>Displays information about the status of a student's Pell payment processing.</p> <p><i>Accepted:</i> Default value populated from the inbound Pell Payment file (EPPPD) when the ED Record Status is Accepted.</p> <p><i>Not Sent:</i> Use this status to prevent the student from being included in the Pell Payment request run. You must enter this status manually.</p> <p><i>Pending:</i> Default value if a Pell Grant is awarded to the student. Indicates that the student's file is waiting to be sent with a Pell Payment request (EPPPD) submission. <i>Pending</i> may also indicate a previously accepted Pell Payment request (EPPPD), which has since come back as <i>not</i> equal to an Accepted or Accepted w/Assumption outcome.</p> <p><i>Repackaged:</i> Indicates an initial Pell Grant has been changed. You must change this status to <i>Send</i> before the student is included in the Pell Payment request run. Incoming Pell Payment (EPPPD) files do not load if the status is <i>Repackaged</i>. Review SQR log upon loading Pell Payment (EPPPD) files.</p> <p><i>Reported:</i> is automatically set when a student's Pell data has been selected during an EPPPD SQR run.</p> <p><i>Review:</i> is populated by default from the inbound Pell Payment file (EPPPD) when the ED Record Status is Rejected, Error, Accepted w/Assumptions, or Duplicate.</p> <p><i>Selected:</i> is automatically set as a result of running the FAPELLR process. Incoming Pell Payment (EPPPD) files do not load if Pell Processing status has been reset to <i>Selected</i>. Review SQR log upon loading Pell Payment (EPPPD) files.</p> <p><i>Send:</i> This status is an internal Pell Processing flag for the system. It indicates that the student's record is ready to be transmitted on an outbound Pell Payment (EPPPD) file. This field value is either set manually or through Mass Change. Incoming Pell Payment (EPPPD) files do not load if the Pell processing status has been reset to <i>Send</i> since the (EPPPD) creation. Review SQR log upon loading Pell Payment (EPPPD) files.</p>
Transaction Nbr (transaction number) and Effective Sequence	<p>Displays the transaction number and effective sequence from the selected ISIR, usually the most recent ISIR. All ISIRs are available for selection and you can change these values to indicate another ISIR. If you want to enter a Pell amount manually when awarding a Pell Grant, use the transaction number, effective date, and effective sequence to indicate the ISIR that you used to calculate the Pell amount.</p>
Primary Academic Program	<p>Indicates the student's main academic program. The academic program from the student's Financial Aid Term record is the default value in this field.</p>
Incarcerated Code	<p>Select the appropriate incarcerated code: <i>N - No longer Incarcerated</i> or <i>Y - Incarcerated</i>. This field is left blank for most students.</p>
Use Fulltime Enrollment	<p>Select this check box if you want to use full-time enrollment to calculate the student's Pell award.</p>
Originate Offered Awards	<p>Select this check box to originate Pell awards with an award status of <i>Offered</i>. If this check box is cleared, Pell awards are only originated when the award status is <i>Accepted</i>.</p>

Originate Max Pell Award (originate maximum Pell award)	Select this check box to originate Pell awards based on the maximum Pell award defined on the Pell Payment Setup page. The system originates the maximum Pell amount regardless of how much the student was offered for the Pell award.
Pell Student Level Override	Select this check box to override at the student level the payment plan information that you set up on the Pell Payment Setup page. When you select this check box, the Low T&F Flag, Academic Calendar,Payment Methodology,Pell Payment Periods,Hours/Credits in Acad Year, and Weeks in Program Acad Year fields become available.

See Also

- Chapter 13, "Setting Up for Pell Payment Processing," Defining Pell Payment Setup, page 421
- Chapter 29, "Awarding Pell Grants," Awarding Pell Grants for the 2010 and Future Aid Years, page 1035

Overriding Pell Eligibility Calculation Setup Values

Access the Student Override page (click the PELL Calculation Override link on the Packaging Status Summary page).

PELL Eligibility Calculation

Student Override

Status:

Active

Pell Calculation Start:

Formula 1 - Full-time

Pell Calculation Midterm:

Formula 1 - Full-time

Pell Calculation Census:

Formula 1 - Full-time

Academic Base Weeks:

32

Non-Standard Base Weeks:

8

Pell Number of Terms:

2

OK

Cancel

Student Override page

Status	Select Active to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods. Select Inactive to use the PEC setup at FA installation, career, or program level.
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Academic Base Weeks	<p>Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC).</p> <p>Valid values are 0.0 to 99.9.</p>
Non-Standard Base Weeks	<p>Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions.</p> <p>Valid values are 0.0 to 99.9.</p>

Pell Calculation Start

Enter the calculation mode to use for Pell calculations made before the student's academic term start date. Values are:

Enrollment Current Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the Current Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units that the student is currently enrolled in, plus the number of units from already completed sessions in the term to determine the student's load for the term.

Enrollment FA Load (For use only with 2009 and prior Aid Years): Directs the Pell calculation to use the FA Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. The FA Load value uses the number of financial aid eligible units that the student is enrolled in for the term to determine the student's load.

Formula 1 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant award by the Pell Number of Terms and uses the student's actual FA Load for each term.

Formula 1 — Full-time (For use only with 2010 and future Aid Years): Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term.

Formula 3 — Current Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

Formula 3 — FA Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Formula 3 — Full-time Load (For use only with 2010 and future Aid Years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Full Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the full time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant regardless of the student's enrollment.

Half Time (For use only with 2009 and prior Aid Years): Directs the Pell calculation to always use the half time Federal Pell Grant disbursement schedule to determine the student's eligibility for a Pell Grant, regardless of the student's enrollment.

**Pell Calculation
Midterm**

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

Pell Calculation Census

Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.

Pell Number of Terms

Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time*, you must populate the Pell Number of Terms field.

Valid values are 0 to 99.

See Also

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Installation Level Defaults, page 15

Managing Aggregate Aid

To ensure that a student does not exceed annual and lifetime limits for certain award programs, it is critical that the system maintain and assess a complete history when determining aid eligibility. Financial Aid provides several options and methods to maintain aggregate aid to ensure that Packaging adheres to eligibility requirements and award limits.

NSLDS data can be used to update aggregate aid system tables. For more information,

See Chapter 5, "Setting Up Packaging Basics," Setting Up Aggregate Aid, page 93.

See Chapter 25, "Assessing Eligibility for Financial Aid," Using NSLDS Data and Processes, page 839.

This section discusses how to:

- Update aggregate aid.
- Assign aggregate sources.

- Review the lifetime aggregate report.

Pages Used to Manage Aggregate Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Aggregate Aid Data	STDNT_AGGR_INPUT	Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data	View or update lifetime total amounts for each aggregate area.
Aggregate Source	SFA_RUN_SETAGGRSRC	Financial Aid, Awards, Aggregates, Assign Aggregate Source, Aggregate Source	Set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process.
Lifetime Aggregate Report	SFA_RUN_AGGR_RPT	Financial Aid, Awards, Aggregates, Review Lifetime Aggregate, Lifetime Aggregate Report	Review internally maintained aggregate data and NSLDS reported total that was pushed into the aggregate aid table.

Updating Aggregate Aid Information

Access the Aggregate Aid Data page (Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data).

Aggregate Aid Data

Jelena Williams FAPKPEL0007

Find | View All First 1 of 2 Last

***Aggregate Area** PELL Pell Grant

Aid Year 2010 Federal Aid Year 2009 - 2010

NSLDS Total 0.00 ☐ Override [NSLDS Data](#)

Percent Scheduled Used 0.0000 ☐ Override **Total % Used:** 133.3333

Undergrad Lifetime Total Used: 4,800.00 **Graduate Lifetime Total Used:** 0.00

*Aggregate Level	*School Code	Award Amount	Terms

Aggregate Aid Data page

This page displays the student's aggregate aid data and allows the entry of data by Aggregate Area and Aid Year. In addition to manual update, the data displayed on this page can be updated by the internal NSLDS Push process. The Packaging Aggregate Source and type of aggregate area determine how the elements that appear on this page are used in the packaging process.

Two major award limit checks are performed during the packaging process:

- The Lifetime limit check uses the total fields that the Packaging Aggregate Source Indicator designates:
 - If the Packaging Source is NSLDS, then the NSLDS Total amounts are used to identify the amount of lifetime limit expended.
 - If the Packaging Source is PS (PeopleSoft), then the Undergrad and Graduate Lifetime Total Used amounts are used to identify the amount of lifetime limit expended.
- The Annual limit check, regardless of Packaging Source, always assesses any aggregate level detail entered for the aid year being packaged.

Aggregate Area Select an aggregate area. The values in this field include all of the aggregate areas that you have established on the Aggregate Aid Limit page. Scroll to view aggregate aid that is posted to other aid years.

NSLDS Total Displays the aggregate total that has been loaded and pushed from NSLDS tables. You can override this value to enter lifetime totals that are applicable to the context aid year.

NSLDS Undergrad Total	Applicable only for the aggregate area defined as a federal TEACH grant. NSLDS Undergrad Total is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 0 – 5. You can override this value to enter lifetime totals that are applicable to the context year.
NSLDS Grad Total	Applicable only for the aggregate area defined as a federal TEACH grant. NSLDS Grad Total is calculated during the aggregate push routine, by summing applicable NSLDS transactions by TEACH program and academic levels 6 – 7. You can override this value to enter lifetime totals that are applicable to the context aid year.
Override	Select this check box to override the NSLDS Total value. If an override is performed, the date/time stamp and operator ID is captured.
NSLDS Data	View detailed NSLDS data that has been loaded to the student's record. A link appears for aggregate areas that have a valid NSLDS aggregate cross-reference.
Percent Scheduled Used	Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 200.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS).
Override	Select this check box to manually override the Percent Scheduled Used value.
Total % Used	Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.
	Note. The system uses these internal fields (not displayed on any pages) to calculate Total % Used: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), and student's remaining Pell Grant eligibility (Max Scheduled Award minus Percent Scheduled Used).
Undergraduate Lifetime Total	View lifetime totals from all undergraduate grade levels. The amount is updated as a result of the Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. Used when Packaging Aggregate Source = PS.

Graduate Lifetime Total	<p>View lifetime totals from all graduate grade levels. The amount is updated as a result of Awarding and Packaging process. It includes any external award amounts entered on this page for the corresponding aid year. The student's undergraduate total may also be included, depending on whether the aggregate area has cumulative or distinct lifetime limits. Used when Packaging Aggregate Source = PS.</p> <p><i>Cumulative:</i> The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. For example, if the student's undergraduate amount is 20,000 USD and the graduate amount is 40,000 USD, then the student cannot receive more than 40,000 USD for this aggregate area.</p> <p><i>Distinct:</i> The undergraduate and graduate limits are tracked separately. For example, if the student's undergraduate amount is 20,000 USD and the graduate amount is 40,000 USD, then the student can receive up to 60,000 USD for this aggregate area.</p>
Aggregate Level	Select an aggregate level that corresponds with the external award data entered for the student.
School Code	Select a school code that corresponds with the external award data entered for the student.
Award Amount	Enter the amount of the expected award that corresponds with the external award data entered for the student.
Loans	Click to access the Aggregate Loan Data page and enter loan and lender information for CommonLine loans.

Assigning Aggregate Sources

Access the Aggregate Source page (Financial Aid, Awards, Aggregates, Assign Aggregate Source, Aggregate Source).

Aggregate Source

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

Parameters

Institution

PSUNV

*Aid Year

2005

Population Selection

☐ All students

☐ Students in list

☒ Use Query

Aggregate Source

☒ FA Installation Default

☐ NSLDS Total

☐ PS Aggregates

Select Query

Query Name:

Aggregate Source page

To assess a student's lifetime aggregate aid history, Aggregate Source directs the Awarding and Packaging processes to use either the NSLDS aggregate totals or PeopleSoft generated undergraduate lifetime and graduate lifetime totals. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary page, in addition to each of the award page components. This option permits you to assign the aggregate source value in batch for an individual student, all students, or a subset of students. The batch assignment process updates the aggregate source value on the student's Packaging Status Summary page.

- Institution**

Select the institution for which you want to create a request file.
- Population Selection**
- All Students**

Select to request that the aggregate source value established on FA Installation Defaults be used for all students for the selected aid year.
- Students in List**

If you select this option, a grid displays that permits you to enter a list of student IDs.
- Use Query**

If you select this option, a Select Query button appears. When you click the button, the system displays a standard Select Query lookup page. You should enter the full or partial name of the query as a search key because the prompt goes through the entire list of available queries in the database. Because the Batch Inform File requires certain fields in a particular order, you can only use queries that return the required fields. PeopleSoft delivers a baseline query (SFA_AGGR_SOURCE) that you can use to create a population of students. Minor changes to the query may be required to suit your institutional needs. You can also define your own query using Peoplesoft Query Manager. PeopleSoft recommends that you use SFA_AGGR_SOURCE as a model or template.

Aggregate Source

FA Installation Default	Select to assign a value of <i>Default</i> to the Aggregate Source on the Packaging Status Summary page.
NSLDS Total	Select to assign a value of <i>NSLDS</i> to the Aggregate Source on the Packaging Status Summary page.
PS Aggregates	Select to assign a value of <i>PeopleSoft</i> to the Aggregate Source on the Packaging Status Summary page.

Reviewing the Lifetime Aggregate Report

Access the Lifetime Aggregate Report page (Financial Aid, Awards, Aggregates, Review Lifetime Aggregate, Lifetime Aggregate Report).

Lifetime Aggregate Report

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Report Parameters

*Aid Year: 2005 Financial Aid Year 2003-2004

Aggregate Area: %

ID: %

Tolerance:

Lifetime Aggregate Report page

Aggregate Area	If you leave this field blank and you save the page or run the report, the system enters a % in this field. The system generates all aggregate areas for each ID.
ID	If you leave this field blank and you save the page or run the report, the system enters a % in this field. The system reports all students with an aggregate area for the selected aid year.
Tolerance	Enter a tolerance amount to use in identifying rows of data where the NSLDS Total is different from the PeopleSoft generated Undergraduate Lifetime and/or Graduate Lifetime totals. Discrepancies that fall above the tolerance are listed in the report. Enter 0 or blank if you want to see all discrepant rows of data.

Using Mass Change for Packaging Status Attributes

You might sometimes want to change the value of a field on the Packaging Status Summary page for a group of students. Mass Change makes this possible. Mass Change definitions for the ED Verification Status and Satisfactory Academic Progress (SAP) fields are included with your system. You can create additional Mass Change definitions for other fields on the Packaging Status Summary page that you want to change. The process for changing packaging status attributes using Mass Change requires four steps.

This section discusses how to:

- Select students.
- Review selected students.
- Move students into financial aid batch update.
- Update packaging status attributes.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Using Mass Change"

Pages Used to Use Mass Change for Packaging Status Attributes

Page Name	Definition Name	Navigation	Usage
Review Mass Change Selection	FA_SAA_REVIEW_MC	Financial Aid, Federal Application Data, Select SAP/Verification (MC), Review Mass Change Selection	Review the students selected by the Mass Change select process before moving on to the next step.
Update Student Aid Attribute	PRCSRUNCNTL	Financial Aid, Federal Application Data, Update SAP/Verification Status, Update Student Aid Attribute	Update the Packaging Status Attributes table after you have moved the selected students to the Financial Aid Batch Update area.

Selecting Students

To change the value of a packaging status attribute for a group of students, the first step is to select the students for whom you want the attribute changed. Use a Mass Change definition to select students. Two Mass Change definitions exist in the system for your use. FA-Verification Status Select is used for changes to the ED Verification Status field, and FA-Sat Acad Progress Select is used for changes to the Satisfactory Academic Progress field. You must create Mass Change definitions for changes to other packaging status attributes.

After you have completed the Mass Change definition, execute the Mass Change Select process using the Run Mass Change page. This process places information about the selected students in a temporary table.

Reviewing Selected Students

Access the Review Mass Change Selection page (Financial Aid, Federal Application Data, Select SAP/Verification (MC), Review Mass Change Selection).

Stdnt Aid Attr Review MC

Review Mass Change Selection

MC Defn ID: FA-Verification Status Select

User: PS

Institution: PSUNV

Aid Year: 1998

Students Selected: 0

New Setting of Indicator: VS Verification Status

Field Value: N

Review Mass Change Selection page

- Students Selected

Displays the number of students selected by the Mass Change select process.
- New Setting of Indicator and Will be

Displays the field that Mass Change changes and the new value of the field.
- Status

These status codes are delivered as part of PeopleTools. You can define how you use these statuses in your Mass Change routine. You can remove students from the selection by making their status *Cancel* or by deleting the row.

Approved: Not applicable in this process.

Cancel: Use this status code if you want to eliminate a student from the mass change.

Error: Indicates that the Mass Change process encountered an error when attempting to move the student into the Financial Aid Update record.

Pending: Indicates that the Mass Change process moved this student into the Financial Aid Batch Update area.

Successful: Indicates that the Mass Change process moved the student into the Financial Aid Batch Update record.
- Cur Val (current value)

Displays the current value of the field to be changed.

Moving Students into Financial Aid Batch Update

In this step, you run a Mass Change to move the selected and reviewed students from the temporary table used in the selection process into the Financial Aid Batch Update area so the packaging status attributes can be changed. You use a Mass Change definition for this step. Two Mass Change definitions exist in the system for your use: FA-Verification Status Update for changes to the ED Verification Status field, and FA-Sat Acad Progress Update for changes to the Satisfactory Academic Progress field. You must create Mass Change definitions for changes to other packaging status attributes. You must run this Mass Change process because the FA-Upd Stdnt Aid Attr Tbl process (FASAAUPD) you run next looks for data in the Financial Aid Batch Update area, not in the temporary table.

After you have completed the Mass Change definition, run the Mass Change Selection using the Run Mass Change page.

Updating Packaging Status Attributes

Access the Update Student Aid Attribute page (Financial Aid, Federal Application Data, Update SAP/Verification Status, Update Student Aid Attribute).

Run the FA-Upd Stdnt Aid Attr Tbl (financial aid - update student aid attribute table) process (FASAAUPD) to update packaging status attributes.

Awarding Restricted Aid

This section provides an overview of restricted aid and discusses how to:

- Enter a student's restricted aid.
- Enter committee comments.
- Enter committee member comments.
- Evaluate a student's restricted aid.

Understanding Restricted Aid

Restricted aid includes awards such as scholarships, fellowships, and institutional or private funds with subjective eligibility requirements. Restricted aid does not refer to federal monies. The restricted aid pages enable you to monitor the process of awarding restricted aid from the application process through committee evaluation and ranking, to the final decision for the award. The requirements for each type of restricted aid are defined in the Restricted Aid Table component.

The process for awarding restricted aid involves the following steps.

1. Enter the student being evaluated for restricted aid on the Restricted Aid page.

You must enter the Restricted Aid ID. You must also enter values in the App Method (application method) and Application Date fields.

2. The committee members use the Restricted Aid Evaluations page to enter their ratings for each of the criteria for the student.

View each student's overall rating by the committee and by individual committee members using the Committee Detail page and Evaluator Detail page. You can access both of these pages from links on the Restricted Aid page.

3. After all committee members have evaluated the student, the committee makes a final decision on whether to offer the student the restricted aid and how much to offer the student.

After the final decision has been made, enter the final decision, the decision date, the amount offered to the student (if appropriate), and any comments on the Restricted Aid page.

4. For students who have been awarded the restricted aid, you must manually enter the restricted aid award on the award entry pages.

If departmental employees are entering the restricted aid award, consider providing them with access to the Manual Student Packaging page only.

See Also

[Chapter 28, "Awarding and Packaging Students," Awarding Online, page 990](#)

[Chapter 5, "Setting Up Packaging Basics," Setting Up Restricted Aid, page 139](#)

Pages Used to Award Restricted Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Restricted Aid	STDNT_RSTRC_AID1	Financial Aid, Awards, Restricted Aid, Make Award, Restricted Aid	Enter or view information about the student's application for a restricted aid award.
Committee Detail	STDNT_RSTRC_AID2	Click Committee Detail on the Restricted Aid page.	Enter committee comments, view details about the committee, and review the committee's comments.
Evaluator Detail	STDNT_RSTRC_AID3	Click the Member Detail link on the Committee Detail page.	Enter committee member comments on the student. View each committee member's overall rating for the student as well as information about the committee member.
Restricted Aid Evaluations	STDNT_RSTRC_AID4	Financial Aid, Awards, Restricted Aid, Evaluate Ratings, Restricted Aid Evaluations	Enter ratings from each member of a restricted aid evaluation committee.

Entering a Student's Restricted Aid

Access the Restricted Aid page (Financial Aid, Awards, Restricted Aid, Make Award, Restricted Aid).

Restricted Aid			
Johnathan Thompson		ID:	FA0373
Aid Year:	2005	Financial Aid Year	2004-2005
		Institution:	PSUNV
Find View All First 1 of 1 Last			
*Restricted Aid ID:	<input type="text"/>	<input checked="" type="checkbox"/> Renewable	
App Method:	Stdnt Appl	Application Date:	05/20/2004
Evaluation Status:	In Progress	Status Date:	06/23/2004
Final Decision:	Approved	Decision Date:	06/23/2004
Offer Amount:	2,500.00	Min Amt:	Max Amt:
Overall Rating:	0.00	Committee Detail	Rating Scheme:
Comment:	<input type="text"/>		

Restricted Aid page

Use the information on this page when you enter the restricted aid award for the student on the Student Aid Package page or Manual Student Packaging page.

Complete the following fields—from the top section of the page—at the time that a student applies for a restricted aid award.

Restricted Aid ID Select the award for which you are considering the student. The values are the restricted aid awards you set up on the Restricted Aid Table component.

Renewable Select to indicate that a student can renew this restricted aid award from year to year. The system automatically selects the check box based on the information that you used when you set up the restricted aid award, but you can change it on this page.

App Method (application method) Indicate how the student applies for the award.

External: The evaluation process is external to the institution, such as an award from a community group.

Met Crit (met criteria): The student meets certain criteria and therefore becomes eligible for evaluation. For example, students may be eligible for an honors scholarship from a department if the students have a GPA of 3.75 or more. A student who meets the GPA criteria is then considered for the award.

Referral: The student was referred for consideration for the award.

Stdnt Appl (student applied): The student submits an application for the restricted aid award.

Application Date	Enter the date that the student submitted heir application or the date that you identified the student as a possible recipient for the restricted aid, depending on the application method.
Evaluation Status and Status Date	<p>Displays the current status of the restricted aid evaluation process for the student, as of the displayed date.</p> <p><i>In Progress:</i> This is the default value. It indicates that one or more committee members are still evaluating the student.</p> <p><i>Complete:</i> All committee members have completed their review of the student, and changed their status to <i>Complete</i> on the Restricted Aid Evaluations page.</p>

After the student has been evaluated, complete the rest of the page with information about the final decision.

Final Decision	<p>The final decision made by the restricted aid award committee for the student.</p> <p><i>Alternate:</i> The student is an alternate for the restricted aid award.</p> <p><i>Approved:</i> The student is approved to receive the restricted aid award.</p> <p><i>Denied:</i> The student does not receive the restricted aid award.</p> <p><i>Eligible:</i> The student is eligible for the restricted aid award, and there may be other criteria that the student must pass before receiving the restricted aid award.</p> <p><i>See Note:</i> Additional explanation regarding the final decision is provided in the Comments field at the bottom of the page.</p>
Decision Date	The date that you enter the final decision. This field is automatically populated with the current date, but you can override this date.
Offer Amount	Enter an amount, within the minimum/maximum range, that the student is to receive for the restricted aid award.
Min Amt (minimum amount)	The lowest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Max Amt (maximum amount)	The highest amount that you can award for this restricted aid award. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Overall Rating	The average of the member rating values for each member of the committee. The Member Rating field can be viewed on the Restricted Aid Evaluations page and is calculated by averaging the value of the components that are used in the evaluation process. This field does not display a value until the evaluation status for each member of the committee is <i>Complete</i> .
Committee Detail	Click this link to access the Committee Detail page and view details about the committee and review the committee's comments.
Rating Scheme	The review process used to evaluate the student. The value you set up on the Restricted Aid Detail 2 page appears by default.
Comment	Enter additional information or explain a final decision of <i>See Note</i> .

Entering Committee Comments

Access the Committee Detail page (click the Committee Detail link on the Restricted Aid page).

Restricted Aid - Committee
Committee Detail

Restricted Aid ID:
REGENTS
Regents Scholarship

View All
First
1 of 1
Last

Committee:
SCHLR
Scholarship Review Committee

Committee Type:
Scholarship Review

Evaluation Status:
Complete
Status Date:
06/08/2001

Committee Rating:
8.67
[Member Detail](#)

Committee Comments:

OK
Cancel

Committee Detail page

Committee	The name of the committee that reviews this restricted aid award. If more than one committee reviews this restricted aid award, use the scroll arrows to view other committees.
Committee Type	Identifies the purpose of the committee. This is established when the committee is created and is display only information on this page.
Evaluation Status	The current status of the student's evaluation for this restricted aid award. All committee members must have an evaluation status of <i>Complete</i> before an overall rating can be calculated for the student.
Status Date	The date when the displayed evaluation status became effective.
Committee Rating	The student's rating for this restricted aid award, which is the average of the ratings of all the committee members.
Member Detail	Click this link to access the Evaluator Detail page and view each committee member's overall rating for the student as well as information about the committee member. You can also enter any comments from the committee member about the student.
Committee Comments	Enter any comments that the committee wants to make about the awarding of this restricted aid to the student. This field is informational only.

Entering Committee Member Comments

Access the Evaluator Detail page (click the Member Detail link on the Committee Detail page).

Restricted Aid - Committee - Committee Members

Evaluator Detail

Restricted Aid ID:REGENTSRegents Scholarship

Committee:SCHLRScholarship Review Committee

View All

First

1 of 2

Last

Evaluator ID:8101Penrose,Steven

Role:CHAIChair

Evaluation Status:CompleteStatus Date:06/08/2001

Member Rating:9.00

Comment:

OK

Cancel

Evaluator Detail page

Evaluator ID	Displays the ID of the committee member whose information is displayed. Use the scroll arrows to view information from other committee members.
Role	The role that the committee member fulfills on this committee. For example, the individual could be the chair, a staff member, or a student member.
Evaluation Status and Status Date	The current status of the member's evaluation of the student for this restricted aid award and the date that the displayed evaluation status became effective.
Member Rating	The average of the numerical ratings assigned to each of the components evaluated by the committee, as entered on the Restricted Aid Evaluations page. The committee should determine what values to use for its rating scheme.
Comment	Any overall comments this committee member has about the student. You enter the member's comments on this page, not the Restricted Aid Evaluations page.

Evaluating a Student's Restricted Aid

Access the Restricted Aid Evaluations page (Financial Aid, Awards, Restricted Aid, Evaluate Ratings, Restricted Aid Evaluations).

Restricted Aid Evaluations			
Stacy Elkins		ID:	FAPK0132
Aid Year:	2004	Financial Aid Year 2003-2004	Institution: PSUNV
Restricted Aid ID:	REGENTS	Regents Scholarship	Rating Scheme UGINTERVW Undergraduate Interviews
Committee:	ALUMNI	Alumni Committee	
Evaluator ID:	CC0010	Dominguez,Sarah Jessica	
Member Rating:	Evaluation Status: In Progress		
Find View All First 1 of 3 Last			
Component:	ACADP Academic Potential		
Type:	Individual	Value:	0
Rating			
Comments:			

Restricted Aid Evaluations page

This page can be used by committee members or an administrative assistant to enter information, and then can be viewed by others who might need to review the information.

Rating information and comments can be added for each component that is evaluated. For example, the committee might review an essay, extracurricular activities, and the student's GPA to decide if the restricted aid should be awarded to the student. The essay, extracurricular activities, and GPA are all components.

Rating Scheme	The review process used to evaluate the student. The value that you set up on the Restricted Aid Detail 2 page appears by default.
Member Rating	Displays the calculated average of the values assigned to all components. For example, if three components are to be evaluated, the values entered for each component are added together and divided by three. If one of the three values is zero, the total is still be divided by three.
Evaluation Status	Indicates the current status of this committee member's evaluation of the student. <i>In Progress:</i> This is the default value. It indicates that the committee member is still evaluating the student. <i>Complete:</i> The committee member has completed his or her review of the student.
Component	Indicates what is being evaluated, such as an essay, the student's extracurricular activities, or a letter of recommendation. Components are translate values that are set up in PeopleSoft Enterprise Recruiting and Admissions.

Type	<p>Indicates whether the component considers only one factor or is based on several components. Component types are useful for informational and reporting purposes.</p> <p><i>Individual:</i> The component is an individual component—it considers only one factor, whether that is an essay, interview, or extracurricular activities.</p> <p><i>Cumulative:</i> The component is made up of other components, such as an overall rating.</p>
Value	<p>Enter the numeric rating value that the member wants to assign to the Component.</p>
Rating Comments	<p>Enter any comments about the rating, if appropriate.</p>

See Also

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook, "Setting Up for Evaluating Applicants"

Chapter 28

Awarding and Packaging Students

This chapter provides overviews of awarding and packaging students; manual awarding, auto packaging, and auto select packaging; and mass packaging. The chapter also discusses how to:

- Award online.
- Perform mass packaging using application data.
- Review mass packaging results.

See Also

Chapter 39, "Processing ACG and SMART Grants," page 1531

Understanding Awarding and Packaging Students

This section discusses early decision awarding, review of information relevant to awarding, awarding and packaging financial aid, award notification, and award updating.

The terms *awarding* and *packaging* are often used interchangeably. In this chapter, awarding refers to manually offering one financial aid item type (award) at a time to a student. Packaging refers to awarding multiple awards at one time to create a financial aid award package for a student.

Early financial aid offers are made to students using award categories instead of specific awards. Award categories give "early decision" students an idea of the types of financial aid that they might receive without committing to exact awards. You define these award categories for your institution. For example, you might have categories for loans, scholarships, work-study, and grants. For awarding actual financial aid monies to the student, you use specific financial aid item types using one of the methods of awarding or packaging.

Before selecting awards for students, you review information on aggregate aid limits, restricted aid awards, and the student's status in the financial aid cycle. You can view aggregate aid information by aggregate area, such as Perkins or Stafford. If your institution uses the National Student Loan Data System (NSLDS) totals for the federal Stafford subsidized, unsubsidized, Perkins, Pell, Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent (SMART), and Student Education Opportunity Grant (SEOG) programs, ensure that NSLDS data has been loaded and pushed to the aggregate tables for direct use by the Awarding and Packaging processes. NSLDS totals are pushed to a specific aid year and you can override them on the Incoming Aggregate Aid component. You can also view a summary of aggregate aid for a student or look at aggregate information by institution.

You can use inquiry pages to monitor a process that awards restricted aid to students. Graduate departments that award merit-based aid might use the Restricted Aid pages. These pages provide information on the progress of the restricted aid awarding cycle; committee members can enter their final decisions, including the restricted aid award amount. This information can then be used to enter the restricted aid award for a student.

The Packaging Status Summary page contains information about a student's status in the financial aid cycle, such as financial aid application status, institutional or federal verification status, Satisfactory Academic Progress (SAP) status, and information related to packaging a student. You can use this page to prevent the Awarding process from continuing if certain parameters are established. For example, you might only award federal awards if the student is meeting SAP. To change a value on the Packaging Status Summary page for a group of students, use Mass Change.

The Packaging Status Summary page has links to other pages where you can review or sometimes modify a student's information. These linked pages contain Financial Aid Term (FA Term) summary information, ISIR data, database match information, the student's financial need calculated with federal and institutional methodology (FM and IM), Pell processing information, Pell eligibility calculation overrides, restricted aid information, and the current financial aid award package information.

After reviewing information, you can award and package students for financial aid manually or in one of three automated ways:

- Manual Awarding is done online, one student at a time, entering awards one by one.
- Auto Packaging is done online at the student level and uses a packaging plan, a set of institutionally defined rules for awarding.

After Auto Packaging generates a financial aid award package for the student, you can make any manual changes to awards in the package before saving the information.

- Mass Packaging is a background process for packaging groups of students using one or more packaging plans.

You select your student population, using either a query definition, an equation, or an external file of students. Then the system assigns a packaging plan to each student based on the processing order and selection criteria associated with each plan. Finally, you initiate the actual Mass Packaging routine, which packages the students based on their assigned packaging plans. After each step in the process, you can further define your targeted population by removing individual students from the selection or packaging plan assignment process.

- Auto Select Packaging mimics Mass Packaging selection as the system evaluates both the Selection Criteria and the Processing Order for each packaging plan, and assigns a packaging plan to an individual student.

You can manually update the package before saving, validating, and posting.

Auto Packaging, Auto Select Packaging, and Mass Packaging use packaging plans to generate award packages that appear on the same page you use for manual awarding. Packaging plans use rules predefined by the United States Education Department (USED), your institution, or both. You can manually modify any generated award package.

After packaging, a validation process verifies that all federal eligibility rules, aggregate aid limits, fiscal fund balances and rules, award rules and limits, and packaging plan rules are met. For automated processing, this is part of the final step when the award package is given to a student. For manual awarding, you click the Validate button to initiate the validation process.

After validation, use a financial aid award notification (FAN) to notify students of their award packages. To do so, you assign a communication to a student and use your choice of mail merge software. If awards change for a student, you send multiple FAN letters.

If a student declines the financial aid offered or declines a category of aid, such as loans, you can use mass actions to accept, cancel, or decline all or specific categories of aid.

Throughout the aid year, you can view summary information regarding the student's awards and the disbursement of those awards.

See Also

Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Defining Packaging Plans, page 247

Prerequisites

Although you can award students manually, the most efficient way to package financial aid awards is with Auto Packaging, Auto Select Packaging, Mass Packaging, or a combination of these three. You are encouraged to set up the parameters needed for Auto Packaging and Mass Packaging to take full advantage of the Financial Aid system.

For manual awarding—assigning individual awards to students, one student at a time—you must set up your defaults (installation defaults and aid processing rule sets), financial aid item types, aggregate aid limits, disbursement plans and disbursement split codes, award adjustment reasons, and award messages for FAN letters.

See Also

Chapter 8, "Setting Up Auto Packaging and Mass Packaging," page 223

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13

Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112

Chapter 5, "Setting Up Packaging Basics," Setting Up Aggregate Aid, page 93

Chapter 5, "Setting Up Packaging Basics," Defining Disbursement Plans and Split Codes, page 85

Chapter 5, "Setting Up Packaging Basics," Setting Up Award Messages, page 108

Chapter 5, "Setting Up Packaging Basics," Preparing for Early Financial Aid Offers, page 138

Understanding Manual Awarding, Auto Packaging, and Auto Select Packaging

The Award Entry component is used for manual awarding, Auto Packaging, and Auto Select Packaging. Use the Student Aid Package page for online manual awarding and Auto Packaging. View how each award affects unmet need and total aid amounts on the Need Summary page. Totals are updated on the Need Summary page after Validation. View the student's Financial Aid Term and term budget information on the Term Summary page.

Note boxes below field descriptions offer tips and directions for entering Pell Grants. If you set the award offer amount to zero dollars, the system calculates Pell Grants when Validation is run.

This section discusses:

- Online manual awarding.
- Auto Packaging.
- Auto Select Packaging.
- Need summary.
- Need summary validation.

See Also

[Chapter 29, "Awarding Pell Grants," page 1029](#)

Online Manual Awarding

To award manually, populate the tabs on the Student Aid Package page and insert additional rows of awards as needed. To have the Validation process populate the offered amount for an award, leave the Offered field at zero and validate the award. For example, to determine the correct Pell Grant amount for a student, enter the Pell Grant financial aid item type, leave the offer amount at zero, and click the Validate button; the Pell Grant amount is calculated based on the student's eligibility and institutional rules and returned to the page with the scheduled disbursements.

After you enter all the awards for a student, run the Validation process before posting the awards to the award tables. Validation checks that the student is eligible for the awards and that no packaging rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. Validation must be successful before you can run the Posting routine, the final step for manually awarding students.

You can combine manual awarding with Auto Packaging. If you do not want a manually entered award to be discarded during Auto Packaging, select the Lock check box. Auto Packaging discards all unlocked awards, and these same financial aid item types can be re-awarded if the award is included in the packaging plan. However, for awards of a financial aid item type that have disbursement protection activated and have been at least partially disbursed, Auto Packaging preserves these awards but reduces the award amount to the amount that has been disbursed. Also, when the Packaging routine processes awards in active/passive mode (such as multicareer packaging, multiple award period processing, or Pell-only repackaging), Auto Packaging does not cancel awards processed in passive mode.

Auto Packaging

Auto Packaging assigns awards to a student based on the rules of the selected packaging plan so your packaging plans must be established before you can use the Student Aid Package page for Auto Packaging. Auto Packaging can be combined with manual awarding by changing the awards entered by the packaging plan or adding additional awards.

Auto Packaging assigns awards and validates the awards all at once. Validation checks that the student is eligible for the awards given and that no packaging or financial aid item type rules have been violated. Validation includes edits for minimum and maximum award limits, aggregate limits, fiscal fund availability, federal eligibility, and financial aid item type rules. Validation can reduce an award amount or set an award amount to zero to comply with rules and limits. If you make no changes to the awards after Auto Packaging, you can post the awards to the award tables directly. If you make manual changes to any awards after Auto Packaging, you click the Validate button to ensure the student is still eligible for the changed or new awards.

Warning! If you repackage locked or disbursed awards using Auto Packaging, post that set of awards (click the Post button) *before performing any validation activity* (click the Validate button). That is, if you use Auto Packaging to repackage a student who has locked awards, disbursed awards, or both, click the Post button first. Do not click the Validate button immediately after Auto Packaging. If you manually change an Auto-Packaged set of awards, post before validating. If you click the Validate button before posting a set of awards that was returned from Auto Packaging, it can potentially compromise the synchronization between offer and accept amounts as well as produce a different award than anticipated.

Note. If the student does not have locked or disbursed awards, you can repackage that student using Auto Packaging and then manually change the awards or validate without posting first.

Auto Select Packaging

Auto Select Packaging selects the packaging plan for an individual student and career by using the selection criteria (equation) and processing order associated with your packaging plans. This is the same selection criteria and processing order used by Mass Packaging.

When you leave the Packaging Plan ID field blank and click the Retrieve button, the system evaluates the Packaging Plan table sequentially and assigns the first packaging plan for which the student qualifies. The system next packages a set of eligible awards according to the packaging rules defined on the packaging plan.

Note. Before using Auto Select Packaging, ensure that your processing order is correctly set in your Packaging Plan table.

See Also

Chapter 28, "Awarding and Packaging Students," Performing Mass Packaging Using Application Data, page 1010

Need Summary

The Need Summary page displays the student's Cost of Attendance (COA), Pell COA, Alternate Pell COA, Expected Family Contribution (EFC), federal and institutional need, federal and institutional award totals, need-based aid award totals, federal methodology (FM) and institutional methodology (IM) special need/cost aid award totals, unmet need, and unmet COA.

The Need Summary page displays the prorated EFC (federal) and institutional EFC values for a student used to determine the student's need. When using different application data sources for packaging, it is important to understand how the EFC and need are affected by different packaging data source selections. For example:

Scenario 1: When the packaging data source on the Financial Aid Defaults page equals *Fed Only*, *Fed*, *Inst*, or *Inst, Fed* and only federal data exists for the student, if you award a financial aid item type with an institutional packaging methodology, the financial aid item type is awarded based on the institutional need. But, if you do not have institutional application data and analysis, institutional need equals institutional COA, because the institutional EFC is 0.00 USD. The Packaging routine awards institutional financial aid item types up to the institutional COA.

Scenario 2: When the packaging data source on the Financial Aid Defaults page equals *Inst Only*, *Fed*, *Inst*, or *Inst, Fed* and only institutional data exists for the student, if you award a financial aid item type with a federal packaging methodology, the financial aid item type is awarded based on the federal need. But if you do not have federal application data and analysis, federal need equals federal COA, because the federal EFC is 0.00 USD. The Packaging routine awards federal financial aid item types up to the federal COA.

If your institution uses IM for early awarding—in October, as an example—and you want to include estimated federal awards, set the Packaging Methodology field on the FA Item Type 2 page for your federal financial aid item types to *Institutional Methodology*. This allows the Packaging processes to use the same need calculation for all the awards; because you have only institutional data you use institutional need. When the federal aid year begins on January 1, you *must* change the Packaging Methodology field back to *Federal* for all your federal financial aid item types. You must also make sure that the student has application data compatible with the packaging data source you indicated on the Financial Aid Defaults page.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117

Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Installation Level Defaults, page 15

Need Summary Validation

Sometimes a manual change to the student's budget does not automatically propagate to the need summary totals. In this case, if you create selection criteria that rely on need-related elements, such as Unmet Need, Overaward Need, Unmet COA, or Overaward COA, the system is not using the most current calculated values.

Run the Need Summary Validation process before performing online packaging (manual, Auto, or Auto Select), Mass Packaging, online Repackaging (manual, Auto, or Auto Select), or batch Repackaging. This ensures that need-related elements, which may be part of your selection equation or PS Query, are updated and reflect the most recent changes to COA. You can run the batch Need Summary Validation process at any time. After you run it on your population, you do not need to run it again unless you make budget changes to several students using the Student Budget Maintenance component. To make a single change online, use the Update Need Summary button on the Student Budget Maintenance page (STDNT_TERM_BUDGET).

See Also

Chapter 32, "Managing Repackaging," Running the Need Summary Validation Process, page 1098

Understanding Mass Packaging

Using Mass Packaging, you can award financial aid for groups of students. A Mass Packaging definition can identify the group of students being selected for Mass Packaging. You can then associate one or more packaging plans with that population. You can evaluate your selected population and the packaging plan associated with each student before Mass Packaging takes place. The system selects the optimum packaging plan for each student based on the combination of your packaging equations and the processing order of the packaging plan. Then the system applies the packaging plan against those selected students, awarding each student based on the defined packaging plan rules.

Three processes are run as part of Mass Packaging. The first process selects students to be included for Mass Packaging evaluation. The second process assigns packaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then awards financial aid to students using the assigned packaging plans. After the first two processes, you can review the students being selected and the assigned packaging plans. You can also review the order in which the students are packaged, again by packaging plan. Finally, you can delete unwanted students. You can run the third process in live mode or in simulation mode to review expected packaging results. Mass Packaging refers to this three-step process. The Mass Packaging process is the third step in Mass Packaging.

Before using Mass Packaging, consider the results that you want the system to produce according to your institution's packaging philosophies. Determine the student attributes to use in the packaging equations to select the correct students for each packaging plan. Review the criteria each packaging plan uses to select students. If some of the selected students cannot be matched to any of your packaging plans, review the list of these students to determine why they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

Note. Your packaging plans must be completely established before you begin Mass Packaging. After you start Mass Packaging, do not make any changes to your packaging plans until you have run all three processes. If you make changes to your packaging plans, rerun the Mass Packaging processes starting with the selection process. Changing packaging plans after students have been selected or assigned to packaging plans may produce incorrect or undesirable results during the Mass Packaging process.

See Also

Chapter 8, "Setting Up Auto Packaging and Mass Packaging," Defining Packaging Plans, page 247

Awarding Online

This section discusses how to:

- View need summary information.
- View term summary information.
- Use Auto Packaging and Auto Select Packaging.
- View award disbursement detail.
- Document award adjustments.
- Award students manually.
- Use professional judgement.

Pages Used to Award Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Need Summary	STDNT_AWARD_NEED	Financial Aid, Awards, Award Processing, Assign Awards to a Student, Need Summary	View need summary information for a student.
Term Summary	STDNT_TERMDATA_SUM	Financial Aid, Awards, Award Processing, Assign Awards to a Student, Term Summary	View budget and Financial Aid term information by term. Each term has a distinct career tied to it.
Student Aid Package	STDNT_AWARD_ENTRY3	Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package	Use this page for manual, auto, or auto select packaging. Auto Packaging and Auto Select Packaging can be combined with manual awarding in the same awarding session.
Award Disbursement Detail	STDNT_PKG_DISB_SEC	Click the Disbursement link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View award disbursement ID detail as well as create custom split amounts and customize loan fee amounts.

Page Name	Definition Name	Navigation	Usage
Packaging Message	PKG_MESSAGE_SEC	Click the Message link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	View the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.
Award Adjustment	AWARD_ADJUST_SEC2	Click the Reason link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page.	Document award adjustments by assigning an award adjustment reason to any adjusted award Action.
Manual Student Packaging	STDNT_AWARD_ENTRY5	Financial Aid, Awards, Award Processing, Assign Departmental Awards, Manual Student Packaging	Award students manually. Prohibits the use of auto packaging.
Professional Judgement	STDNT_AWARD_ENTRY4	Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement	Use professional judgement to override all rules (including federal and aggregate rules) except for fiscal limits when awarding financial aid. Award students without a budget. All item types awarded from this component are set to locked.

Viewing Need Summary Information

Access the Need Summary page (Financial Aid, Awards, Award Processing, Assign Awards to a Student, Need Summary).

Student Aid Package		Need Summary		Term Summary	
Owens,Melinda R				ID:	FAPK0330
Aid Year: 2005 Financial Aid Year 2004-2005				Institution:	PSUNV
Need Summary by Award Period				Find	First 1 of 2 Last
Award Period: Academic		EFC Status: Official			
Fed Year COA:	22,700.00	Inst Year COA:	22,700.00	Pell Year COA:	22,700.00
Prorated EFC:	13,938	Institutional EFC:	0	Alt Pell COA:	12,700.00
Fed Need:	8,762.00	Inst Need:	22,700.00	Pell LTHT:	16,600.00
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	0.00	N/B Aid (Inst):	0.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	0.00	Total Aid (Inst):	0.00		
Unmet Need (Fed):	8,762.00	Unmet Need (Inst):	22,700.00		
Unmet COA(Fed):	22,700.00	Unmet COA(Inst):	22,700.00		

Need Summary page

Award Period

View the different award periods (*Academic* or *Non-Standard*) by using the scroll arrows.

EFC Status (expected family contribution status)

Displays the status of the prorated EFC: *Official*, *Rejected*, or *Unofficial*.

Fed Year COA (federal year cost of attendance) and **Inst Year COA** (institutional year cost of attendance)

The federal or institutional COA for the award period.

Prorated EFC and **Institutional EFC**

The prorated EFC and the institutional EFC are the EFCs adjusted for the number of months from the Budget Duration on the FM (Prorated) or IM (institutional) extension record—entered on the Global and Federal Options page and the IM Value Parms 1 page, respectively.

Fed Need (federal need) and **Inst Need** (institutional need)

The federal or institutional COA minus the EFC. This is the student's financial aid need.

Montgomery GI Bill/AmeriCorps

Displays the amount you entered on the Veteran's Education Benefits page. The same amount is entered in the federal and institutional columns.




N/B Aid (Fed/Inst) (need-based aid federal/institutional)

The amount of need-based aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type.

Special Need/Cost Aid (Fed/Inst) (special need/cost aid federal/institutional)	The amount of special need/cost aid awarded to the student. This is determined by the Meet Need/Cost attribute of the financial aid item type. Special need/cost aid always reduces the student's need first, then replaces the student's EFC.
Total Aid (Fed/Inst) (total aid federal/institutional)	The total amount of aid awarded for federal and institutional calculations. This is N/B Aid plus Special Need/Cost Aid.
Unmet Need (Fed/Inst) (unmet need federal/institutional)	The Fed/Inst Need minus Total Aid.
Unmet COA (Fed/Inst) (unmet COA federal/institutional)	This is the Fed/Inst Year COA minus Total Aid.
Pell Year COA	The student's COA calculated by adding up the budget items that have an associated Pell category. This COA is used when calculating Pell Grants using the Regular Federal Pell Grant Schedule.
Alt Pell COA	The COA used when determining if a student's Pell award should be calculated using the Alternate Pell Grant Award Schedule. This COA is calculated by adding up budget items that have associated Pell categories of <i>Tuition</i> , <i>Child Care</i> , and <i>Disability</i> .
Pell LTHT (Pell less than half-time)	Displays the Pell less than half-time amount. The system determines which Pell annual COA to use when calculating each term Pell award. If the term enrollment is less than half time, the system uses the less than half-time Pell annual COA to determine the Pell award.

Viewing Term Summary Information

Access the Term Summary page (Financial Aid, Awards, Award Processing, Assign Awards to a Student, Term Summary).

Student Aid Package		Need Summary		Term Summary	
Forrester, Susan H			ID: FAPK0130		  
Aid Year: 2005 Financial Aid Year 2004-2005			Institution: PSUNV		
Term Budget Find First 1 of 2 Last					
Term:	0540	2005 Spr	Career:	UGRD Undergraduate	
Dependency Status:	DEP		Housing:	On Campus	Inst Term COA: 11,350.00
Academic Level:	Freshman		Residency:		Fed Term COA: 11,350.00
FA Load:	Full-Time				Total Aid: 5,312.00
FA Term Data Find First 1 of 2 Last					
Term:	0540	2005 Spr	Career:	UGRD Undergraduate	
Weeks of Instruction:	15		Prim Prog:	LAU	Expected Grad Date:
Academic Level:	Freshman		Acad Plan:	UNDECL-UG	
FA Load:	Full-Time		Sub-Plan:		
NSLDS Loan Year:	1st Yr Prv				

Term Summary page

The Term Budget group box displays the term and the corresponding career. Use the scroll arrows to see each term within the aid year. The following fields are also displayed.

Dependency Status	Indicates whether the student is a dependent or independent student.
Academic Level	The student's academic level for the term and career. Academic level comes from the Financial Aid Term data.
FA Load	The financial aid load for the term and career shown. Financial aid load can be full-time, 3/4-time, half-time, and less than half-time.
Housing	Displays the housing option specified by the student on the ISIR, like on campus or off campus.
Residency	Displays whether a student is considered a state resident or not. This value comes from the residency data in personal data.
Inst Term COA (institutional term COA)	This is the term-based institutional cost of attendance by career.
Fed Term COA (federal term COA)	This is the term-based federal cost of attendance by career.
Total Aid	This is the total of all disbursements for all awards within the given term. This value is derived by adding all the disbursements for different awards that fall in the same term.

The FA Term Data group box displays data for the term from the Financial Aid Term component. Use the scroll arrows to see each term within the aid year.

See Also

Chapter 19, "Managing Financial Aid Terms," Building a Financial Aid Term, page 509

Using Auto Packaging and Auto Select Packaging

Use the Student Aid Package page for Auto Packaging and Auto Select Packaging individual students. You select the packaging plan for Auto Packaging and the system selects the packaging plan for Auto Select Packaging:

- For Auto Packaging, select the packaging plan in the Packaging Plan ID field and then click the Retrieve button.
- For Auto-Select Packaging, leave the Packaging Plan ID field blank and click the Retrieve button. Using the processing order and selection criteria (equation) associated with packaging plan in the Packaging Plan table, the system evaluates each plan and selects the first plan for which the student meets the selection criteria.

Access the Student Aid Package page (Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package).

Student Aid Package

Need Summary

Term Summary

Klein,Angela Z

ID: FAPK0143

Aid Year: 2006 Financial Aid Year 2005-2006

Institution: PSUNV

Career: UGRD Undergrad

Packaging Plan ID: FEDERAL Retrieve

Repackaging Plan ID: Repackage

Package Status: Applied

Aggregate Source: Default Validate

Award Period: Both Post Reset

Award

Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
60		UGRD	9000000000303	PLUS Loan	22,700.00	22,700.00	01	01	Disbursement +

Student Aid Package page: Award tab

Note. Click the tabs in the scroll area to access multiple views of this page. Fields common to both Award and Status views are documented first.

Common Page Information

Career

The active career for the student to be used for packaging at this time. If the student has only one career, it is defaulted into the field. Choose from among the current valid careers for the student—defined on the Financial Aid Term record, which you can change on the FA Term page—and careers for which the student has received any financial aid awards.

After you select a career, do not change this field until after you click the Post button or the Reset button. This prevents you from changing awards for more than one career at a time.

Only the packaging plans and disbursement plans associated with the active career are available during this awarding session.

Note. If the student has only one career for the aid year, that career defaults into the Career field and you do not need to select a career.

Packaging Plan ID

The packaging plan you want to use to package the student. Only packaging plan IDs that match the student's career are available.

Retrieve

Click to run Auto Packaging or Auto Select Packaging. The awards associated with the packaging plan appear in the Award and Status tabs. If a student is not eligible for an award in the packaging plan, the award amount is set to zero, and a Message link displays. If nonzero awards are returned, a disbursement link displays the scheduled disbursements for the award.

Awards that are not locked on the Student Aid Package page are canceled when Auto Packaging is performed, with the exception of already disbursed awards of a financial aid item type that has disbursement protection activated.

Note. When you click the Retrieve button, you can receive the following error message: *The assignment to the specified field failed.* This indicates that one of the student's award amounts exceeds the size of the Offered and Accepted fields. This error can occur when the student receives the term limit maximum 999,999.00 USD for multiple terms in an aid year. The resulting award amount (if two terms exist, 999.998.00 USD) is larger than the field.

Package Status

This field is known as the Aid Processing Status field on the Packaging Status Summary page (Financial Aid, View Packaging Status Summary). Various financial aid processes automatically update the packaging status. You can manually change the package status after award posting, and you must save your change before exiting the page. You can use the package status to set the packaging status to a value other than *Completed* after you have posted an award. For example, if a department award is manually awarded and then you want to use Mass Packaging, you would want to set the package status from *Completed* back to *Package*.

Applied: The student has applied for financial aid. This value is automatically populated when you load a financial aid application such as an ISIR or a PROFILE application.

No App Rcd (No Electronic Application Received): No electronic application has been received.

Completed (Packaging Completed): The student's award package has been posted. The Posting routine automatically updates the field to this value.

Review (Ready for Counselor Review): The student should be or is currently being reviewed by a financial aid counselor.

Package (Ready for Packaging): The student is ready for packaging.

Repackage: The student is ready for repackaging. Can be set by the External Award Load process.

Aggregate Source

This field enables you to set the aggregate source to assess a student's lifetime aggregate aid history during the Awarding and Packaging process. You can set the aggregate source at the financial aid installation default level and on the Packaging Status Summary in addition to each of the award page components.

Default: Directs awarding and packaging to use the Aggregate Source value set at the FA Installation level.

NSLDS: Directs the awarding and packaging to use NSLDS aggregate totals that have been loaded and pushed into the aggregate tables.

PS: Directs awarding and packaging to use aggregate undergraduate and graduate totals that have been completely maintained by the institution and Financial Aid packaging process.

Note. An Aggregate Used field is also provided on the Packaging Status Summary page. Aggregate Used captures the exact aggregate source used in the most recent awarding or packaging for this student.

Award Period

Provides the Packaging routine with the intended award period processing mode for the award period that you are currently packaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period you select functions like the packaging plan award period attribute in the determination of passive/active mode for existing awards. When the Packaging routine employs passive/active mode processing, you can treat the awards in one award period (academic) as passive awards while awarding the other award period (nonstandard). The Packaging routine does not modify or repackage passive awards; it preserves them, unlike active awards that are subject to change. However, the Packaging routine still includes the award amounts of passive awards in determining remaining annual aggregate limits or other eligibility requirements and in updating need summary balances.

After you select an award period, the Packaging routine evaluates the disbursement plan/split code pattern for each of the existing posted awards and determines whether the pattern matches or falls within the selected award period mode. The Packaging routine then makes the rows of passive awards unavailable, indicating that these awards cannot be modified by either you or the Packaging routine. All other awards can be modified.

After you select the award period for a student, you must complete your activity for the selected award period. Validate and post the awards or click the Reset button to clear the results before you can select a new award period for that student.

Both: You are currently packaging the student for both award periods. This is the default value. The Packaging routine reevaluates all existing awards, processing all awards as active awards. When you select *Both*, all awards are available for reevaluation.

Academic: You are currently packaging the student for the academic award period (AAP) only. The Packaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Packaging routine processes all other existing awards as passive awards.

Non-Std (nonstandard): You are currently packaging the student for the nonstandard award period (NSAP) only. The Packaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award periods. The Packaging routine processes all other existing awards as passive awards.

Validate

Click this button during manual packaging to have the award package checked by the Validation process after you enter each award or after you enter all awards. During validation, all eligibility rules, aggregate limits, minimum and maximum award limits, fiscal fund availability, and financial aid item type rules are checked. To determine the maximum award limit, the Validation process uses the lowest maximum award limit from the maximum limits set at the item type, financial aid item type, aggregate aid limit, fiscal item type, and packaging plan levels. The Validation process uses the lowest minimum award limit from the minimum limits set at the item type, financial aid item type, and packaging plan levels.

The Validation process may cancel an award or lower the award amount to comply with established rules and limits. If validation fails on any award, a Message link appears in the award row. Validation may also reduce an award amount or set an award amount to zero. Any awards that are assigned a zero dollar amount when you run Auto Packaging are removed during posting. When you are manually packaging a student, you can have the Validation process populate the correct award amount based on the student's eligibility and institutional rules by entering a zero amount for the award. An award must be successfully validated before you can post the award.

During manual packaging, the Validation process does not impose restrictions on offering unsubsidized Stafford loans before you award students their full subsidized Stafford eligibility. You are responsible for offering students their full subsidized Stafford eligibility before offering unsubsidized Stafford loans.

Post

Click to save the award information and update the student award tables. If any award fails to post, an error message is displayed and none of the awards are posted. If you do not post the student's awards before leaving the page, the awards are not saved.

Note. If you award two instances of the same item type where one instance of the item type has aggregate levels associated with it and the other instance does not have aggregate levels associated with it, the Award Posting routine returns an error. For federal item types, you must cancel the instance that does not have the aggregate levels associated with it and re-award the instance with associated aggregate levels. For item types that are not designated as federal, any award that has previous matching aggregate level history is rejected if no matching level limit record exists. You also receive this message, "No matching aggregate level limit for a defined aggregate table." You must then correct the error by either eliminating the aggregate history for the level or by reestablishing level limits for that award.

Reset

This button refreshes the page with any previously posted awards and removes any awards that you attempted to make on the page before posting during the awarding session. Posted awards are not removed. Click this button to validate new awards and see what effect the new awards might have toward the existing package before you post them.

Nbr (number)	<p>The sequence number is automatically assigned in increments of ten when awards are entered. Click in the field to modify the sequence number and to change the number. You can control the order of new or existing awards by using a sequence number in between two existing sequenced awards. Duplicate sequence numbers are not permitted. The sequencing of awards is always preserved throughout the packaging session of the student.</p> <p>All awards for the passive careers are sequenced to the top of the packaging sequence. These passive awards are not changed regardless of need or other changes in the student's record.</p>
Action	<p>Select the action being taken on the award. When initially entering a new award, the values are <i>B—Offer/Accept</i>, <i>O—Offer</i>, and <i>X—Discard</i>.</p> <p>After an award has been posted, the values are <i>A—Accept</i>, <i>B—Offer/Accept</i>, <i>C—Cancel</i>, <i>D—Decline</i>, and <i>O—Offer</i>.</p> <p>Any change to an award action is logged in the Award Activity Log, which can be viewed on the Award Activity page.</p> <p><i>A—Accept</i>: Accepts an award that has been offered to the student. If a student wants to accept less than the new offered amount — for an item type that is not a loan — the student can use the action A.</p> <p><i>B—Offer/Accept</i>: Use when you are initially offering an award to a student for which an explicit acceptance from the student is not needed (such as grants, scholarships, and so on). If you select this option and modify the existing award, the system automatically changes the accepted amount to the offered amount of the existing award. If you increase an existing award, the system replaces the accepted amount with the new offered amount. Similarly, the same behavior takes place for reduced awards.</p> <p><i>C—Cancel</i>: Cancels the award, but retains the award entry with a zero amount in the list of awards for that student. If you cancel an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated.</p> <p><i>D—Decline</i>: Declines the award, but retains the award entry with a zero amount in the list of awards for that student. If you decline an award, the award amount is reduced to zero, and the need summary and related award and fiscal pages are updated.</p> <p><i>O—Offer</i>: Offer the award to the student. The accepted amount is zero.</p> <p><i>X—Discard</i>: Deletes the award row when validation is performed if the award has not been posted. For example, you would use this status if you entered an award in error or you decided not to award the student a particular financial aid item type.</p>
Career	<p>This field displays the career for which you made the award. This indicates which career is associated with each award.</p>
Item Type	<p>The financial aid item type ID for the award that you want to award.</p>

Award Tab

See the previous exhibit for an example of this tab.

Description	Description of the financial aid item type. This field is populated when you move out of Item Type field.
Offered	<p>The amount that you want to offer the student for this award. If no amount is entered during manual packaging and the action is <i>O</i> or <i>B</i>, the Validation process assigns an optimal award amount based on the student's eligibility, the student's financial need, the aggregate aid limits, and the financial aid item type limits.</p> <p>For Pell Grants, leave the offered amount at zero dollars to have the Validation process calculate the Pell Grant amount for the student based on the latest ISIR transaction, Pell COA, Alternate Pell COA, nine-month EFC, and the student's FA Load value for each term. If you enter an amount for a Pell Grant, the Validation process may adjust it depending on the student's eligibility.</p> <hr/> <p>Note. To award a Pell Grant amount calculated using ISIR data other than the latest ISIR, enter the amount in the Offered field. To ensure that your Pell processing information matches, go to the Packaging Status Summary page and click the PELL link to access the Pell Information page. On the Pell Information page, select the transaction number and effective date that matches the ISIR used to calculate the Pell Grant amount.</p> <hr/>
Accepted	<p>This is the amount of the award the student accepts. If the action was <i>Offer/Accept</i>, this amount is automatically entered and matches the offered amount.</p> <hr/> <p>Note. You can decrease an award to an amount less than what has already been disbursed by manually entering an amount in the Accepted field that is less than the sum of the individual disbursed amounts for the award. The Packaging routine then determines a new set of scheduled disbursements based on the defined even split option or disbursement percentage associated with the award.</p> <hr/>
Disb Plan (disbursement plan)	Select a disbursement plan for the award. If the financial aid item type has a default disbursement plan defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.
Split Code	Select a split code. Only split codes associated with the selected disbursement plan are available. If the financial aid item type has a default split code defined at either the financial aid item type or the packaging plan level, that value is defaulted in this field.

Disbursement

This link appears after you validate an award. Click to access the Award Disbursement Detail page and view the terms, number of disbursement IDs, and amounts per disbursement ID as well as create custom split amounts and customize loan fee amounts.

Note. Before reinstating a previously canceled Pell Grant, you must change the custom split code from XX to the designated disbursement plan ID for the student. You can then click the Validation button to have the Pell Grant amount recalculated.

Message

This link appears if a message is generated by validation or Auto Packaging. Click to access the Packaging Message page and view the reason why a particular financial aid item type failed or was reduced by validation or Auto Packaging.

Packaging Message

*Nbr: 50	Message Number: 9165
Item Type: 999999999901	Action: Offer

The manual award has been reduced to be consistent with Financial Aid Need target.

Packaging Message page

Note. If you select a disbursement for three terms but have valid Financial Aid Terms for only two of the terms, how the award is treated depends on whether you selected the Missing Term Enrollment - Split evenly across valid term option for the financial aid item type. If you selected this option, then the system splits the award equally among the valid terms. If you did not select this option, the system splits the award amount as follows. (Similar calculations would occur for a four-term disbursement where only two or three Financial Aid Terms were valid.) 1) The three terms would have disbursement splits of 20%, 40%, and 40%. The percentages associated with the valid terms are added together. For example, $20\% + 40\% = 60\%$ 2) To calculate each valid term's award amount, the term disbursement split (20% or 40%) is divided by the percentage calculated in #1 to get the percentage which is applied to the award amount. For example, $20\% \text{ divided by } 60\% = 0.3333 \text{ (33.33\%)}$ and $40\% \text{ divided by } 60\% = 0.6667 \text{ (66.67\%)}$. The award amount multiplied by 0.3333 = first term award amount and award amount multiplied by 0.6667 = second term award amount. If you want an award split equally between the two valid Financial Aid Terms, select a two term disbursement plan.

Status Tab

Select the Status tab.

Student Aid Package | Need Summary | Term Summary

Klein, Angela Z ID: FAPK0143
 Aid Year: 2007 Financial Aid Year 2006 - 2007 Institution: PSUNV

Career: UGRD Undergrad Package Status: Applied
 Packaging Plan ID: Retrieve Aggregate Source: Default
 Repackaging Plan ID: Repackage Award Period: Both

Award Notification
 Validate Post Reset

Award		Status									
Nbr	Action	Career	Item Type	PJ	EA	Lock	Need Override	Override	Charge Priority	Award Status	
<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Student Aid Package page: Status tab

PJ (professional judgement)

This check box is selected if an existing award was added or modified using professional judgement. This check box is display only. You can manually modify awards that have this check box selected; if you use Auto Packaging, the award is not modified.

See Chapter 28, "Awarding and Packaging Students," Using Professional Judgement, page 1008.

Because professional judgement awards can be manually modified on this page, anyone with access to this page—not just those with access to the Professional Judgement page—can modify professional judgement awards. Members of your staff may not realize an existing award is a professional judgement award unless they check the Status page. For example, when reviewing a student's award package, a staff member sees that the student has an existing 10,000.00 USD award. The initial view of the Student Aid Package page does not indicate whether this award was made using professional judgement. To determine whether the award was made using professional judgement, the staff member should click the Status tab to see if the PJ check box is selected before modifying the award. You may want to address this issue during staff training, and advise your staff members to proceed cautiously.

EA(external award)

Set automatically when the External Award Load process successfully posts an external award. EA attribute is also set if an existing award is update from an external award loan transaction. For example, the External Award Load processing updating the disbursed amounts for an existing work-study award. When the EA attribute is checked, the award is prevented from being overwritten by the Auto and Mass Packaging and Repackaging processes.

Lock

Select to prevent the award from being overwritten by the Auto Packaging or Mass Packaging process and to override the financial aid item type level award amount limits. Manually locking an award does not allow you to override the fiscal, aggregate, and equity limits, and any federal or legal rules or limits. You can also set a global lock at the financial aid item type level. Doing this always sets the award to locked when performing Manual, Auto, or Mass Packaging. An example of an award you might want to lock is an award from a private source that should not be altered by another Packaging process.

Need Override	Select to prevent the system from changing the award amount when the student's need changes. The check box is available only for awards associated with the active career. When this check box is selected, only fiscal limits and aggregate rules are applied during validation. When this check box is selected, you do not need to select the Lock or Override check boxes because their functionality is effectively included when you select Need Override.
Override	Select to allow the award amount to exceed the award amount limits defined for this financial aid item type. The override does not allow award amounts to exceed legal limits, available fiscal funds, or aggregate limits.
Charge Priority	Select the type of charge you want this award to pay. The list contains the charge priority lists set up at your institution. If your institution has defined a charge priority list for the financial aid item type, it defaults in this field. See <i>PeopleSoft Enterprise Student Financials 9.0 PeopleBook</i> , "Completing Student Financials General Setup," Defining Charge Priority List Rules.
Award Status	The current status of the award. The award status can be <i>Offered</i> , <i>Accepted</i> , <i>Canceled</i> , or <i>Declined</i> .
Adjustment Reason	If you adjust an award action, this link appears immediately after the Award Status field. Click to access the Award Adjustment page and enter the reason for the adjustment.

Warning! If you repackage locked and/or disbursed awards using Auto Packaging, PeopleSoft recommends that you post that set of awards *first* (click the Post button) *before performing any manual modification activity* requiring you to click the Validation button. In other words, if the student has a set of locked or disbursed awards, and you repackage that student using Auto Packaging, click the Post button first. Do not click the Validate button immediately upon returning from Auto Packaging, or manually change the set of awards that was returned from Auto Packaging and click the Validate button. If you click the Validate button *before posting* a set of awards that was returned from Auto Packaging, it can potentially compromise that synchronization between offer and accept amounts as well as produce a different award than anticipated.

Note. If the student *does not* have a set of locked or disbursed awards, and you repackage that student using Auto Packaging, you can manually change that set of awards and click the Validate button immediately after Auto Packaging without needing to post that set of Auto Packaged awards first.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Default Disbursement Plans and Split Codes, page 127](#)


[Chapter 33, "Managing Special Cases in Packaging," Processing Awards for Multiple Award Periods Employing Passive/Active Mode, page 1155](#)

Viewing Award Disbursement Detail

Access the Award Disbursement Detail page (click the Disbursement link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

Award Disbursement Detail

Sequence: 10 **Item Type:** 900000000105 **Net Award Amount:** \$4,000.00

Disbursement Plan: 01 ***Split Code:** 01  ☐ **Custom Split**

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0530	Academic	U1	2,000.00	2,000.00	2,000.00	0.00
02	0540	Academic	U1	2,000.00	2,000.00	2,000.00	0.00

Award Disbursement Detail page

Sequence	The sequence number of this award.
Item Type	The financial aid item type of this award.
Net Award Amount	The award amount minus any fees, such as loan fees.
Disbursement Plan	The disbursement plan selected for the award.
Split Code	The split code selected for the award. If the Custom Split check box is selected, or if this is an award that originated as multiple entries with the same disbursement plan but different split codes, or if this is a Pell Grant generated by a default Pell award rule of <i>FA Enrollment</i> , <i>FA Load</i> , or <i>FA Enrollment</i> , this field displays <i>XX</i> to indicate that a custom split is being used.
Custom Split	Select to manually define a disbursement split rather than use a predefined split code. Then manually enter the offered amounts for each term. The dollar amounts for each term cannot exceed the total amount of the award. Validation must be run after any custom split codes are entered so loan fees can be recalculated and redistributed.

Custom Loan Fee

This check box appears if the award financial aid item type is defined as a loan and the award has been accepted. Select the check box to make the Offer Loan Fee and Net Disb Balance (net disbursement balance) fields available. Enter the custom loan fee amounts in the Offer Loan Fee field for each term. The Net Disb Balance changes based on the amount you enter in the Loan Fee field.

When a custom loan fee is entered, it is preserved unless the loan award amount changes. You do not need to use the Lock or Override check boxes to ensure that the custom loan fees are preserved.

Note. If the offer amount or accept amount of a loan is changed on an award entry page, the accept loan fee amounts are reset to the default loan fee amounts by the Packaging routine. After validating the new loan amounts, reenter the custom loan fee amounts if you want to have custom loan fees for the new loan amount.

Loan processing can also update an award's loan fee amount as a custom loan fee if the loan fee returned by the Lender or trading partner is different from the established fee for the loan. If loan processing changes the loan fee amount, the Custom Loan Fee check box is selected but is not available.

See [Chapter 36, "Processing CommonLine Loans," Reviewing CL 4 Status and Phase Codes, page 1336.](#)

The following fields are displayed in the Disbursement Distribution group box. Some fields are available for editing as noted.

Disb ID (disbursement ID)	Identifies each separate disbursement for the award.
Term	The term in which the disbursement ID is disbursed.
Award Period	The award period, academic or nonstandard, of the term.
Aggr Lvl (aggregate level)	The student's aggregate level for the disbursement ID.
Offered	The amount of the total offered amount scheduled for this disbursement ID.
Accepted	The amount of the total accepted amount scheduled for this disbursement ID.
Offer Loan Fee	The portion of the total loan fee, based on the total offered amount, assigned to this disbursement ID. This field appears only for loan financial aid item types and becomes available when you select the Custom Loan Fee check box.
Offer Rebate	The portion of the Direct Lending loan interest rebate for the offered amount assigned to this disbursement ID. This field appears only for Direct Loan financial aid item types.
Accept Loan Fee	The portion of the total loan fee, based on the total accepted amount, assigned to this disbursement ID. This field appears only for loan financial aid item types.

Accept Rebate	The portion of the Direct Lending loan interest rebate for the accepted amount assigned to this disbursement ID. This field appears only for loan financial aid item types.
Net Disb Balance (net disbursement balance)	The accepted amount for the disbursement ID plus the accept rebate amount minus the accept loan fee for the disbursement ID. If no loan fees or interest rebates exist, the net disbursement balance is the same as the accepted amount. This field becomes available when you select the Custom Loan Fee check box.
Disbursed	The amount disbursed to the student for this disbursement ID.

Documenting Award Adjustments

Access the Award Adjustment page (click the Reason link on the Student Aid Package page, Manual Student Packaging page, or Professional Judgement page).

Award Adjustment

Item Type: 9000000000040

FASS: Grant

Career: UGRD Undergrad

Adjustment Reason: VHH

Household Size Verification

Award Adjustment page

You can use award adjustment reasons for reporting and statistical purposes. You define the award adjustment reasons during setup.

Adjustment Reason	Select the appropriate reason from the list of reasons you created on the Award Adjustment Reasons page.
Loan Reason	<p>This field appears only if you are adjusting a loan. Enter a value in this field only if you are adjusting a previously certified loan. Select a loan reason to explain the reason for the adjustment. Loan reasons are intended for use with CommonLine post-guarantee adjustment processing, but the field is currently for informational purposes only.</p> <p><i>Canceled:</i> The previously guaranteed loan was canceled.</p> <p><i>Change:</i> Indicates a change in the student's information as the reason for adjusting the loan.</p> <p><i>OverAward:</i> Indicates a change in the loan to prevent an overaward.</p> <p><i>Re-Issue:</i> A request to the lender to reissue a loan that was previously reported canceled.</p> <p><i>Withdrawal:</i> Indicates the change to the student's loan amount is due to the student's withdrawal from the institution.</p>

See Also

Chapter 5, "Setting Up Packaging Basics," Setting Up Award Messages, page 108

Awarding Students Manually

Access the Manual Student Packaging page (Financial Aid, Awards, Award Processing, Assign Departmental Awards, Manual Student Packaging).

Manual Student Packaging
Need Summary
Term Summary

Forrester, Susan H
ID: FAPK0130

Aid Year: 2005 Financial Aid Year 2004-2005
Institution: PSUNV

Career: UGRD **Award Period:** Both

Aggregate Source: Default **Package Status:** Completed

Reset Validate Post

Award Notification

Award Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement +
20		UGRD	900000000040	FASS: Grant	2,000.00	0.00	AS	01	Disbursement +
30		UGRD	9000000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01	Disbursement +
40		UGRD	9000000000304	Sub Staff - Sem	2,625.00	2,625.00	01	01	Disbursement +

Manual Student Packaging page

This page is identical to the Student Aid Package page except the Auto Packaging functionality is not available.

Other departments on campus can use this page to enter students' departmental awards, such as academic or athletic scholarships. Using item type security, you can limit the choice of financial aid item types available for selection on the page.

See Also

Chapter 28, "Awarding and Packaging Students," Using Auto Packaging and Auto Select Packaging, page 995

Using Professional Judgement

Access the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement).

Professional Judgement
Need Summary
Term Summary

Elkins, Stacy G
ID: FAPK0132

Aid Year: 2006 Financial Aid Year 2005-2006
Institution: PSUNV

Career: UGRD Undergrad
Package Status: Applied
Award Notification

Packaging Plan ID: DL_TWO_SP Retrieve
Aggregate Source: Default
Validate

Repackaging Plan ID: Repackage
Award Period: Both
Post
Reset

Award
Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code			
10	X	UGRD	900000000376	Perkins - ELO - Quarter	0.00	0.00	26	01		Disbursement Message	+
20	X	UGRD	900000000382	DL QTR Sub Stafford Loan	0.00	0.00	D9	01		Disbursement Message	+
30	X	UGRD	900000000383	DL QTR Unsub Stafford Loan	0.00	0.00	D9	01		Disbursement Message	+
40	X	UGRD	900000000380	PLUS - Quarter	0.00	0.00	26	01		Disbursement Message	+
50	X	UGRD	900000000384	TERI Loan - Qtr	0.00	0.00	26	01		Disbursement Message	+

Professional Judgement aid page: Award tab

The fields on the Professional Judgement page correspond to those on the Student Aid Package page. Awards that you enter or adjust on this page have the PJ check box selected on the Student Aid Package and Manual Student Packaging page to indicate that the normal eligibility criteria and award limits were not applied to this award.

See Chapter 28, "Awarding and Packaging Students," Using Auto Packaging and Auto Select Packaging, page 995.

The Professional Judgement page enables you to override the Packaging routine's edits—financial aid item type rules, federal aggregates (annual and lifetime), federal eligibility rules—when awarding a student. This override applies to awards that have the following actions taken:

- An award is manually entered on the Professional Judgement page.
- An existing award is changed on the Professional Judgement page.
- A change is made to an Auto Package award on the Professional Judgement page.

Because this page can be used to bypass all federal eligibility and awarding rules, careful thought should be given when granting security for this page.

Awards that you enter or modify on this page cannot be modified on any award entry pages except the Professional Judgement page.

Award Tab

See the previous exhibit for this tab.

Select the Award tab.

When you use the Award tab on the Professional Judgement page to add a new manual award or to override the offered or accepted amount for an item type of an existing award, the system automatically selects the PJ check box on the Status tab on the Professional Judgement page.

Status Tab

Select the Status tab.




Professional Judgement

Need Summary

Term Summary

Klein,Angela Z


ID: FAPK0143





Aid Year: 2007


Financial Aid Year 2006 - 2007


Institution: PSUNV


Career: UGRD  Undergrad

Package Status: Applied  [Award Notification](#)

Packaging Plan ID:  [Retrieve](#)






Aggregate Source: Default  [Validate](#)

Repackaging Plan ID:  [Repackage](#)

Award Period: Both  [Post](#) [Reset](#)

Award

Status

*Nbr	Action	Career	*Item Type	PJ	EA	Lock	Need Override	Override	Charge Priority	Status
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		+

Professional Judgement page: Status tab

When you add a new award manually or override an existing award, the system selects the corresponding check box in the PJ column for the adjusted item type. You can clear this check box.

Performing Mass Packaging Using Application Data

This section discusses how to:

- Run Mass Packaging selection.
- Review students selected for Mass Packaging.
- Assign packaging plans to students.
- Review packaging plans assigned by query.
- Review packaging plans assigned by packaging plan.
- Process Mass Packaging.

Pages Used to Perform Mass Packaging Using Federal Application Data

Page Name	Definition Name	Navigation	Usage
Mass Packaging Select	RUNCTL_FA_BPKG	Financial Aid, Awards, Mass Packaging, Select Students, Mass Packaging Select	Run mass packaging selection, which selects the students that you defined on the Mass Packaging Select Students page. This is the first of the three processes for Mass Packaging.

Page Name	Definition Name	Navigation	Usage
Mass Packaging by Students	FA_BPKG_STDLIST	Financial Aid, Awards, Mass Packaging, View Results by Students, Mass Packaging by Students	Review a list of the student selected using the Mass Packaging selection definition in the Mass Packaging Student Select process.
Mass Packaging Assign	RUNCTL_FA_BPKG_ASN	Financial Aid, Awards, Mass Packaging, Assign Plans, Mass Packaging Assign	Assign packaging plans by running the second step in Mass Packaging, associating a packaging plan (or series of packaging plans) with the students who have been selected for Mass Packaging.
Mass Packaging Plans Assigned	FA_BPKG_PLANQRY	Financial Aid, Awards, Mass Packaging, View Results by Query, Mass Packaging Plans Assigned	Review the packaging plans assigned to students, who are sorted by ID. You can also view students not assigned a packaging plan.
Mass Packaging Students by Plan	FA_BPKG_STDPLAN	Financial Aid, Awards, Mass Packaging, View Results by Plan, Mass Packaging Students by Plan	Review the packaging plans assigned to students sorted by the Sort Field field designated on the Mass Packaging Assign page. This page displays one packaging plan at a time.
Mass Packaging Process	RUNCTL_FA_BPKG_PRC	Financial Aid, Awards, Mass Packaging, Process Mass Packaging, Mass Packaging Process	Process mass packaging. Initiate the eligibility review and award calculation routine, which is the third and last step in the Mass Packaging process.

Running Mass Packaging Selection

Access the Mass Packaging Select page (Financial Aid, Mass Packaging, Awards, Select Students, Mass Packaging Select).

Mass Packaging Select	
Run Control ID: PS	Report Manager Process Monitor <input type="button" value="Run"/>
Population Selection	
Selection Tool	PS Query
Query Name	QA_CS_FA_ISIRPRESENT
	Launch Query Manager Preview Selection Results
Parameters	
*Institution	PSUNV PeopleSoft University
*Aid Year	2007 Financial Aid Year 2006 - 2007

Mass Packaging Select page

Selection of students is based on the Selection Tool criteria defined in the query, equation, or external file. No other assessment is used to filter students for the Mass Packaging process.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Selection Tool	Displays if Population Selection check box is selected. Select from: <i>Equation Engine</i> , <i>PS Query</i> , or <i>External File</i> , or enter a tool that your institution created to select the IDs to assign to the student group. Additional parameters are displayed for your selected tool.
Query Name	<p>Displays only when <i>PS Query</i> is selected in the Selection Tool field. Select a PS Query that uses one of these bind records:</p> <ul style="list-style-type: none"> • Use SFA_BPKGX_BIND if your criteria is not career-dependent. • Use SFA_BPKG_BIND if Career is a criteria element.
Equation	<p>Displays only when <i>Equation Engine</i> is selected in the Selection Tool field. Select an equation that is defined with the application prompt Mass Packaging Selection.</p>

Parameters

Institution and Aid Year Enter the institution and aid year for which to run Mass Packaging.

Reviewing Students Selected for Mass Packaging

Access the Mass Packaging by Students page (Financial Aid, Awards, Mass Packaging, View Results by Students, Mass Packaging by Students).

Mass Packaging by Students

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2007 Financial Aid Year 2006 - 2007

Selection Definition: QUERY: PACKAGE_QRY

					Customize	Find	View 100		First	1-100 of 214	Last
ID	Name	Career		*Process Status							
FARPK0001	Smith,Jalen H	UGRD	Undergraduate	Valid							
FARPK0002	Dexter,Pete F	UGRD	Undergraduate	Valid							
FARPK0003	McKenzi,Stacy G	UGRD	Undergraduate	Valid							
FARPK0004	Foneghue,Matt G	UGRD	Undergraduate	Valid							
FARPK0005	Morehouse,Joshua F	GRAD	Graduate	Valid							
FARPK0005	Morehouse,Joshua F	UGRD	Undergraduate	Valid							
FARPK0006	Ebbitts,Carol V	UGRD	Undergraduate	Valid							
FARPK0007	Parker,Cindy L	UGRD	Undergraduate	Valid							
FARPK0008	Sneider,Andrew P	UGRD	Undergraduate	Valid							
FARPK0009	Morrelly,Anna H	UGRD	Undergraduate	Valid							
FARPK0010	Daggett,Amber W	GRAD	Graduate	Valid							
FARPK0011	Morrison,Angel P	UGRD	Undergraduate	Valid							
FARPK0012	Melayon,Arthur A	UGRD	Undergraduate	Valid							
FARPK0013	Joretski,Angie X	UGRD	Undergraduate	Valid							
FARPK0014	Korevano,Angela Z	UGRD	Undergraduate	Valid							
FARPK0015	Killian,Betty O	GRAD	Graduate	Valid							
FARPK0016	Bass,Betsy I	UGRD	Undergraduate	Valid							

Mass Packaging by Students page

Process Status Indicates whether the student is packaged with this batch of students in the next two steps of Mass Packaging.

Invalid: The student is not included in this Mass Packaging run.

Valid: The student is processed during this Mass Packaging run.

You can delete the student's row or change the Process Status to *Invalid* to remove any students you do not want to be included in this packaging batch. If students have multiple careers, a row exists for each career for which they are packaged.

Assigning Packaging Plans to Students

Access the Mass Packaging Assign page (Financial Aid, Awards, Mass Packaging, Assign Plans, Mass Packaging Assign).

Mass Packaging Assign

Run Control ID: PS

Report Manager

Process Monitor

Run

Report Request Parameters

Institution

PSUNV

PeopleSoft University

Aid Year

2007

Financial Aid Year 2006 - 2007

Selection Definition

Packaging Plan Parameters

FindFirst1 of 1Last

*Career

UGRD

*Plan ID

FEDERAL

*Sort Field

FED_EFC

AscDesc

Mass Packaging Assign page

Select the Mass Packaging Selection Definition that you are using to select your students for the current Mass Packaging run.

In the Packaging Plan Parameters group box, select one or more packaging plans the system should apply against the current group of students selected for Mass Packaging.

Career The career you select here determines the packaging plans available in the Plan ID field.

Plan ID	The ID of the packaging plan to apply to eligible students in this Mass Packaging run. Only packaging plans associated with the selected career are available. It does not matter in what order you list the plan IDs on this page. If you list multiple packaging plans, the packaging plans are applied against the selected students based on the processing order defined for each packaging plan in the packaging plan setup. You can review the students and the packaging plans that have been associated with them after you run the process.
Sort Field	<p>Select a field on which to sort students within each plan. You must then choose to sort the students in either ascending or descending order. For example, you could sort students based on ascending EFC or descending federal need. The third step of the Mass Packaging process evaluates students in the order in which they are sorted. The fields by which you can sort students are:</p> <ul style="list-style-type: none"> • <i>ADJ_PAR_CONTRIB</i> (Adjusted Parent Contribution) • <i>AGI_PAR</i> (Parents' Adjusted Gross Income) • <i>AGI_STU</i> (Students' Adjusted Gross Income) • <i>EMPLID</i> (Employee ID) • <i>FED_EFC</i> (Federal Effective Family Contribution) • <i>FED_NEED</i> (Federal Need) • <i>FED_PARENT_CONTRB</i> (Federal Parent Contribution) • <i>FED_STDNT_CONTRB</i> (Federal Student Contribution) • <i>INST_EFC</i> (Institutional Effective Family Contribution) • <i>INST_PARENT_CONTRB</i> (Institutional Parent Contribution) • <i>INST_STDNT_CONTRB</i> (Institutional Student Contribution) • <i>PRORATED_EFC</i> (Prorated Effective Family Contribution) • <i>TRANS_PROCESS_DT</i> (Transaction Process Date) <p>Do not use <i>FED_EFC</i> for packaging plans that have a non-standard award period. <i>FED_EFC</i> represents the <i>PRIMARY_EFC</i>, which is the 9-month EFC that is synonymous with the academic award period. Therefore, all non-standard award period <i>FED_EFC</i> values equal 0.00. If you sort by <i>FED_EFC</i> for non-standard plans, the system defaults the sort order to <i>EMPLID</i>.</p>
Asc (ascending)	Select this option to have the students sorted in ascending order.
Desc (descending)	Select this option to have the students sorted in descending order.
Run	Run the Mass Packaging Plan Assignment process (FAPPKASN) when you are ready to assign packaging plans.

Reviewing Packaging Plans Assigned by Query

Access the Mass Packaging Plans Assigned page (Financial Aid, Awards, Mass Packaging, View Results by Query, Mass Packaging Plans Assigned).

Mass Packaging Plans Assigned

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2007 Financial Aid Year 2006 - 2007
Selection Definition: QUERY: RPKG_IDS_OFFICIAL

Find First 1-8 of 8 Last

Packaging Plan ID: P_EFC_3850 Primary EFC < 3851 **Academic Career:** GRAD
Sort Packaging by: FED_EFC Ascending **Plan Order:** 44

Find | View All First 1-6 of 16 Last

*ID	Name	FED_EFC	
FARPK0020	Quigley,Bonnie E	\$0.00	Remove
FARPK0040	Locklander,Jimbo G	\$0.00	Remove
FARPK0075	Gimson,Jolene O	\$0.00	Remove
FARPK0100	Llewellyn,Karl Y	\$0.00	Remove
FARPK0110	Megantee,Andreas J	\$0.00	Remove
FARPK0131	Goddenberg,Raoul S	\$0.00	Remove

Packaging Plan ID: P_EFC_HIGH Primary EFC > 20000 **Academic Career:** GRAD
Sort Packaging by: FED_EFC Ascending **Plan Order:** 47

Find | View All First 1-6 of 16 Last

*ID	Name	FED_EFC	
FARPK0010	Daggett,Amber W	\$0.00	Remove
FARPK0015	Killian,Betty O	\$0.00	Remove
FARPK0025	Williams,Chester G	\$0.00	Remove
FARPK0030	Claurishan,David L	\$0.00	Remove
FARPK0050	Valdarez,Missy T	\$0.00	Remove
FARPK0085	Hessenman,Rob N	\$0.00	Remove

Mass Packaging Plans Assigned page

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page—Packaging Plan ID, Academic Career, and Sort Packaging by—and the Plan Order from the packaging plan setup. The plan order is the processing order for the packaging plan. Use the scroll arrows to view the other packaging plan IDs used for this Mass Packaging session.

For each packaging plan, the page displays the students selected for the packaging plan in ascending ID order. The list provides the student's ID, name, and value for the field identified in the Sort Packaging by field (the name of the third column changes to match this field). Click Remove to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.



Reviewing Packaging Plans Assigned by Packaging Plan

Access the Mass Packaging Students by Plan page (Financial Aid, Awards, Mass Packaging, View Results by Plan, Mass Packaging Students by Plan).

Mass Packaging Students by Plan

Academic Institution: PSUNV PeopleSoft University
Aid Year: 2007 Financial Aid Year 2006 - 2007
Selection Definition: QUERY: RPKG_IDS_OFFICIAL

Packaging Plan ID: P_EFC_3850 Primary EFC < 3851 **Academic Career:** GRAD
Sort Packaging by: FED_EFC Ascending **Plan Order:** 44

[Find](#) | [View All](#) First  1-7 of 16  Last

*ID	Name	FED_EFC	
FARPK0020	Quigley,Bonnie E	\$0.00	Remove
FARPK0040	Locklander,Jimbo G	\$0.00	Remove
FARPK0075	Gimson,Jolene O	\$0.00	Remove
FARPK0100	Llewellyn,Karl Y	\$0.00	Remove
FARPK0110	Megantee,Andreas J	\$0.00	Remove
FARPK0131	Goddenberg,Raoul S	\$0.00	Remove
FARPK0132	Darby,Felix T	\$0.00	Remove

Mass Packaging Students by Plan page

To identify each packaging plan, the page displays three fields from the Mass Packaging Assign page—Packaging Plan ID, Academic Career, and Sort Packaging by—and the Plan Order from the packaging plan setup. The plan order is the processing order for the packaging plan.

For each packaging plan, the page displays the students selected for the packaging plan, sorted by the field identified in the Sort Packaging by field. The list provides the student's ID, name, and value for the field identified in the Sort Packaging by field (the name of the third column changes to match this field). Click Remove to remove a student from the list and prevent the student from being packaged during the final step of the Mass Packaging process.

You can view students who were not assigned a packaging plan by selecting a career but no packaging plan when you open the page.

Processing Mass Packaging

Access the Mass Packaging Process page (Financial Aid, Awards, Mass Packaging, Process Mass Packaging, Mass Packaging Process).

Mass Packaging Process

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

*Institution	PSUNV	PeopleSoft University	<input type="radio"/> Live
*Aid Year	2007	Financial Aid Year 2006 - 2007	<input checked="" type="radio"/> Simulation
*Selection Definition	QUERY: PACKAGE_QRY		

Mass Packaging Process page

Select the selection definition you want to use to run the Mass Packaging process.

Select **Simulation** or **Live** as the mode for which you want to run this Mass Packaging. If you select **Simulation**, you can review the results before deciding to update all award tables. If you select **Live**, the process updates all award-related tables.

Note. It is highly recommended that you run the Mass Packaging process in **Simulation** mode at least once before running it in **Live** mode.

A student can receive one, none, all, or some of the awards defined in the packaging plan assigned to them. The system applies your financial aid item type rules, federal eligibility rules, fiscal limits, and aggregate aid rules to determine whether the student receives a particular award as part of their package. The Mass Packaging process also determines award amounts, disbursement plans, and split codes for each award.

When you run the third step of the Mass Packaging process in **Live** mode, the process updates various tables including student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log. If the Mass Packaging process encounters an error, the Posting process provides a message regarding the reason the student was not packaged and the student is displayed on the Mass Packaging Errors page. The Mass Packaging process continues packaging students and writing errors to the Mass Packaging Errors page until it reaches the number of errors allowed by the Background Errors Allowed field on the Financial Aid Defaults page. When the allowed errors limit is reached, the Mass Packaging process stops.

Note. Students whose award record encounters posting errors during Mass Packaging **Live** mode appear on the Mass Packaging Details component (Financial Aid, Awards, Mass Packaging) as well as the Mass Packaging Errors page. However, these students have not actually been packaged. The Mass Packaging Details pages displays the awards the student would have received if there were no posting errors.

Run the Mass Packaging process (FAPPKBKG) when you are ready to package students.

Reviewing Mass Packaging Results

You can use these pages to view detailed information regarding the student's financial aid eligibility, need information, and specific award information. You can also view a list of students who were not packaged because they did not meet the selection criteria for any of the packaging plans used in the Mass Packaging process.

This section discusses how to:

- Review Mass Packaging summary information.
- Review student eligibility and need information.
- Review student award information.
- Review Mass Packaging errors.

Pages Used to Review Mass Packaging Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mass Packaging Summary	PKG_BATCH_SUMM	Financial Aid, Awards, Mass Packaging, View Mass Packaging Summary, Mass Packaging Summary	Review the number of students selected for each packaging plan and those students packaged by the Mass Packaging process.
Eligibility/Need	PKG_BATCH_STDNT	Financial Aid, Awards, Mass Packaging, View Mass Packaging Details, Eligibility/Need	Review a student's financial aid eligibility and need information based on the results of the packaging plan. This page displays information for a single packaging plan.
Awards Detail	PKG_BATCH_AWD	Financial Aid, Awards, Mass Packaging, View Mass Packaging Details, Awards Detail	Review detailed information about the awards that were packaged for a student as a result of the Mass Packaging process.
Mass Packaging Award Message	PKG_BATCH_MSG_SEC	Click the Message link on the Awards Detail page.	View the reason why the student did not receive this award.
Mass Packaging Disbursement	PKG_BATCH_DISB_SEC	Click the Disbursement link on the Awards Detail page.	View scheduled disbursement detail for an award.

Page Name	Definition Name	Navigation	Usage
Mass Packaging Errors	PKG_BATCH_ERR	Financial Aid, Awards, Mass Packaging, View Mass Packaging Errors, Mass Packaging Errors	Review students who were not packaged by any packaging plan and an explanation of why they were not packaged.
Mass Packaging Error Detail	PKG_BATCH_ERR_SEC	Click the Detail link on the Mass Packaging Errors page.	View the error message associated with the error code displayed on the Mass Packaging Errors page.

Reviewing Mass Packaging Summary Information

Access the Mass Packaging Summary page (Financial Aid, Awards, Mass Packaging, View Mass Packaging Details, Mass Packaging Summary).

Mass Packaging Summary

Institution: PeopleSoft University **Aid Year:** 2005 2004-2005

Find First ◀ 1 of 1 ▶ Last

Batch Number: **Live vs. Simulation:** Simulation

Batch Date Time:

Student Batch Results Customize | Find | First ◀ 1 of 1 ▶ Last

Description	Description	Total Selected	Total Packaged	Total Not Packaged
		0		0

Mass Packaging Summary page

Batch Number The number assigned to the batch of students when you run the Mass Packaging process.

Batch Date Time The date and time you ran the Mass Packaging process or Institutional Mass Packaging process for this batch of students.

Live vs. Simulation Indicates whether you ran the Mass Packaging process in live or simulation mode.

Live: The Mass Packaging process updated all award-related tables.

Simulation: You can review the results of the Mass Packaging process, but award-related tables were not updated.

Packaging Plan ID Identifies the packaging plan used in the Mass Packaging run.

Total Selected The total number of students assigned this packaging plan.

Total Packaged The total number of students who were successfully packaged using this packaging plan.

Total Not Packaged The total number of students who were assigned this packaging plan but did not receive any awards because of one or more errors.

Reviewing Student Eligibility and Need Information

Access the Eligibility/Need page (Financial Aid, Awards, Mass Packaging, View Mass Packaging Details, Eligibility/Need).

Eligibility/Need		Awards Detail	
Batch Number	8	Batch Date Time	04/24/2006 5:07PM
Institution	PeopleSoft University	Aid Year	2006-2007
Packaging Plan	Primary EFC > 20000	Career	Graduate
Total Packaged		16	

Eligibility Summary				Find	View All	First	1 of 16	Last
Sequence	1	ID	FARPK0010	Name	Daggett, Amber W			
Federal Dependency Status		Dependent		Institutional Dependency Status				
Federal PELL Eligibility				Received First Bachelor Degree		No		
Title IV Eligibility								

Need Summary by Award Period				Find	View All	First	1 of 2	Last
Award Period	Academic		EFC Status	Official				
Fed Year COA	30,050.00		Inst Year COA	30,050.00				
Prorated EFC	27,463		Institutional EFC	0				
Fed Need	2,587.00		Inst Need	30,050.00				
Montgomery GI Bill/AmeriCorps	0		Montgomery GI Bill/AmeriCorps	0				
N/B Aid (Fed)	2,587.00		N/B Aid (Inst)	18,500.00				
Special Need/Cost Aid (Fed)	27,463.00		Special Need/Cost Aid (Inst)	0.00				
Total Aid (Fed)	30,050.00		Total Aid (Inst)	18,500.00				
Unmet Need (Fed)	0.00		Unmet Need (Inst)	11,550.00				
Unmet COA(Fed)	0.00		Unmet COA(Inst)	11,550.00				
Pell Year COA	0.00	Alt Pell COA	0.00	Pell LTHT	0.00			

Eligibility/Need page

This page displays information for a single packaging plan. To see other students packaged using the selected packaging plan, use the top set of scroll arrows. Use the bottom set of scroll arrows to view the information for each student by award period.

Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.
Institutional Dependency Status	Indicates whether the student is dependent or independent under institutional methodology.
Federal PELL Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.
Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

See Also

Chapter 28, "Awarding and Packaging Students," Viewing Need Summary Information, page 991

Reviewing Student Award Information

Access the Awards Detail page (Financial Aid, Awards, Mass Packaging, View Mass Packaging Details, Awards Detail).

Eligibility/Need Awards Detail

Batch Number	8	Batch Date Time	04/24/2006 5:07PM	Total Packaged	16
Institution	PeopleSoft University	Aid Year	2006-2007		
Packaging Plan	Primary EFC > 20000	Career	Graduate		

Find | View All First 1 of 16 Last

Student Packaging Sequence: 1ID: FARPK0010 Daggett,Amber W

Customize 1-7 of 7									
Sequence	Item Type		Disb Plan		Split Code		Offer Amount		
10	900000000702 STATE_REAL	RP	SEM_SMRs	01	FALLSPRING	\$0.00	Message	Disbursement	
20	900000000043 FASSSTIPND	RP	SEM_SMRs	01	FALLSPRING	\$4,000.00		Disbursement	
30	900000000200 FWS	RP	SEM_SMRs	01	FALLSPRING	\$0.00	Message	Disbursement	
40	900000000322 Perk - ELO	RP	SEM_SMRs	01	FALLSPRING	\$0.00	Message	Disbursement	
50	900000000304 STAFF-SUB	RP	SEM_SMRs	01	FALLSPRING	\$0.00	Message	Disbursement	
60	900000000305 STAFFUNSUB	RP	SEM_SMRs	01	FALLSPRING	\$18,500.00		Disbursement	
70	900000000044 FASSLOAN	RP	SEM_SMRs	01	FALLSPRING	\$7,550.00		Disbursement	

Awards Detail page

All awards in the packaging plan are displayed for each student. The page displays zero and nonzero awards—nonzero awards display the scheduled disbursements.

Student Packaging Sequence	The sequence number indicates the order in which students were packaged during Mass Packaging.
Sequence	The sequence number automatically assigned in increments of ten when awards are entered.
Item Type	The financial aid item type of the student's award.
Disbursement Plan	The disbursement plan assigned to the student's award.
Split Code	The split code of the student's award, which indicates how the award is split for disbursement to the student.
Offer Amount	If the Offer Amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, preexisting award which was set to 0.00 by Mass Packaging. The awards with a zero Offer Amount are no longer visible after the student's award package is posted.
Message	Click to access the Mass Packaging Award Message page and view the reason why the student did not receive this award.
Disbursement	Click to access the Mass Packaging Disbursement page and view scheduled disbursement detail for an award.

Reviewing Mass Packaging Errors

Access the Mass Packaging Errors page (Financial Aid, Awards, Mass Packaging, View Mass Packaging Errors, Mass Packaging Errors).

Mass Packaging Errors				
Batch #:	31	Batch Date Time:	07/12/2001 6:10PM	Total Not Pkgd: 1
Institution:	PeopleSoft University	Aid Year:	2001	
Pkg Plan:	Leading summer Plan	Career	UGRD	
First ◀ 1-2 of 2 ▶ Last				
Error Sequence	ID	Name	Error	
1	PK0051	Muhoberac,Jamie	9338	Detail
1	PK0051	Muhoberac,Jamie	9338	Detail

Mass Packaging Errors page

Only students who had serious errors (such as students who had their Financial Aid Term deleted) during the actual Mass Packaging run are in this list. Generally, no students should be listed on this page. If students are listed, look beyond the packaging plan for the reasons for the error.

Batch # (batch number)	The batch number identifies the particular Mass Packaging session.
Batch Date Time	The date and time the Mass Packaging session was run.
Total Not Pkgd (total not packaged)	The total number of students who were assigned to the packaging plan but were not packaged due to an error.
Pkg Plan (packaging plan)	The packaging plan with which the system tried to package the listed students.
Error Sequence	Key by which the error data is sorted.
ID	The ID of the student who was not packaged.
Error	The message number that identifies the error that prevented the student from being packaged.
Detail	Click to access the Mass Packaging Error Detail page and view the error message associated with the displayed error code.

Mass Packaging Error Messages

The following table lists and explains possible Mass Packaging posting error messages:

<i>Message Number</i>	<i>Message Text</i>	<i>Message Explanation</i>
108	The Disbursement ID Table entries have no terms associated with them.	The disbursement plan's Disbursement ID Table either has no entries or the entries do not have terms specified. Enter Disbursement ID table entries or update the existing entries with valid terms.
111	There is no Student Award Period record for the awarded period.	The student does not have a Student Award Period record for the period being awarded.
112	The maximum number of Term records is exceeded.	The limit to the number of Term records that can be associated with an award period is exceeded by this disbursement plan. Either reduce the number of terms or contact your technical resource to increase the maximum number of term records permitted in an award period.

Message Number	Message Text	Message Explanation
113	The maximum number of Student Award Period records is exceeded.	The limit to the number of Student Award Period records that can be associated with a student for the award period is exceeded by this student. Either eliminate some of the Student Award Period records or contact your technical resource to increase the maximum number of Student Award Period records permitted.
114	There is no Set ID for this Institution's item types.	The institution does not have an "Item Type" Set ID in the Set Control Group Table. The Set ID is used to determine which group of item types is valid for this institution. Determine the correct Set ID for this institution's item types and create an Item Type record in the Set Control Group Table for this institution.
115	The Item Type is Invalid.	The transaction's financial aid item type is not valid.
132	The Transaction has a custom split code but no Award Disbursements.	The transaction has a custom split code of 'XX' which requires award disbursement records to be associated with the transaction, but there are none. Either supply the missing disbursement records or specify an existing disbursement plan.
140	The existing Student Award has no disbursement records.	The existing Student Award has no disbursement records. All Student Awards are required to have disbursement records. Contact technical support and report this error.
141	The existing Student Award's Disbursement Records maximum is exceeded.	The existing Student Award has more Disbursement Records than are supported by the FAPAWPST program. The FAPAWPST program can be modified to support more Distribution Records; this transaction cannot post until the program is modified.
152	No CPS school code for this Institution.	There is no CPS school code specified for this transaction's Institution, Aid Year, Academic Career combination. Either the combination is invalid or the CPS school code needs to be added to the database for this Institution, Aid Year, Academic Career combination.

<i>Message Number</i>	<i>Message Text</i>	<i>Message Explanation</i>
155	No Student Aid Attribute Record was found for this transaction.	No Student Aid Attribute Record was found for this transaction.
156	No Award Summary Information was found for this transaction.	No Award Summary Information was found for this transaction.
158	An error was encountered when processing aggregates for this student.	An error was encountered when processing aggregates for this student.
159	No Student Award information was found for this student.	No Student Award Information was found for this student.
160	No Student Award Summary was found for this transaction.	No Student Award Summary was found for this transaction.
161	No Disbursement Information was found for this transaction.	No Disbursement Information was found for this transaction.
162	No Disbursement Summary information was found for this transaction.	No Disbursement Summary information was found for this transaction.
163	Disbursement ID was not found in Disbursement Plan for this transaction.	Disbursement ID was not found in disbursement plan for this transaction.
165	Maximum number of Disbursement Plans was exceeded.	Maximum number of disbursement plans was exceeded.
166	Term not found in Disbursement Plan for this transaction.	Term not found in disbursement plan for this transaction.
9328 (Generic Message)	Student failed the batch Posting process. The Awards were not posted.	Student failed the batch Posting process. The Awards were not posted.
9330	Student failed Batch Posting. Awards not posted. Multiple Disb Plans for Non-Canceled Item Type.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different.

<i>Message Number</i>	<i>Message Text</i>	<i>Message Explanation</i>
9331	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan in transit.	Student's package contains multiple instances of the same loan financial aid item type in transit that have not been canceled where the disbursement plans are different.
9332	Student failed Batch Posting. Awards not posted. Multiple Disb Plans - Loan was originated.	Student's package contains multiple instances of the same loan financial aid item type (at least one originated) that have not been canceled where the disbursement plans are different.
9333	Failed Batch Posting. Awards not posted. Multiple Disb Plans - Auth/Disb balances greater than 0.	Student's package contains multiple instances of the same financial aid item type that have not been canceled where the disbursement plans are different. Authorization/disbursement has occurred and the authorization/disbursement amount is greater than zero.
9334	Student failed Batch Posting. Awards not posted. Offer available is negative (Item Type Fiscal).	Award offer amount can never be negative on the Assign Fiscal Limits page.
9335	Student failed Batch Posting. Awards not posted. Accept available is negative (Item Type Fiscal).	Award accept amount can never be negative on the Assign Fiscal Limits page.
9336	Failed Batch Posting. Awards not posted. Multiple Aggregate Levels for same Career & Item Type.	Student cannot have multiple aggregate levels for the same financial aid item type and same career
9337	Student failed Batch Posting. Awards not posted. Unable to update Award Aggregates data.	Error detected while trying to update aggregate information for this student. Batch Posting process failed; award not posted.

Chapter 29

Awarding Pell Grants

This chapter discusses how to:

- Award Pell Grants for the 2009 and prior aid years.
- Award Pell Grants for the 2010 and future aid years.

Awarding Pell Grants for the 2009 and Prior Aid Years

This section provides an overview of Pell Grant awarding for the 2009 and prior aid years and discusses how to:

- Define Pell eligibility calculation setup.
- Calculate Pell Grants.
- Reinstate a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

This section discusses Pell Grant Awarding for the 2009 and prior aid years.

Note. Beginning with the 2010 aid year, the system calculates Pell Grant differently. This section discusses awarding Pell Grants for the 2009 and prior aid years. For information on awarding Pell Grants for 2010 and future aid years:

See [Chapter 29, "Awarding Pell Grants," Awarding Pell Grants for the 2010 and Future Aid Years, page 1035.](#)

The Pell Grant awarding functionality automatically calculates students' Pell Grant awards based on their primary EFC, Pell COA, Pell COA for less than half-time (Pell LTHT), and enrollment (FA Load or Current Load). The system calculates the Pell Grant for each term, then sums each term's amount to give an annual Pell Grant award amount. As part of your setup, you can choose to use full-time enrollment, part-time enrollment, the student's actual FA Load value, or the student's Current Load value (which takes into account current and completed Open Entry/Open Exit session) as the enrollment value. You can also choose to calculate the student's Pell Grant eligibility using a different default enrollment value at different points in the term: before the term's start date, on or after the term's start date but before the financial aid census date, and on or after the financial aid census date.

When entering a Pell Grant manually on the Student Aid Package page, you can leave the award amount at zero. When you click the Validation button, the system automatically calculates the Pell Grant award according to the Pell eligibility calculation defined in your setup.

Defining Pell Eligibility Calculation Setup

You must complete the Pell eligibility calculation (PEC) setup for your Pell Grants to be properly calculated. The PEC setup involves defining the default enrollment value to use when calculating the student's Pell eligibility: before the term's start date, on or after the term's start date but before the financial aid census date, and on or after the financial aid census date. Having different default enrollment values for these three points in time gives you flexibility in projecting and awarding Pell Grants. You can calculate a student's Pell Grant using a projected enrollment value for the period prior to the term start date, such as full time or half-time. Then when the student's term begins, you can recalculate the student's Pell Grant award using the student's actual enrollment (FA Load or Current Load). The Financial Aid Term build process determines the student's FA Load using the units in the FA Taken field. The FA Load field is one of the fields you can lock using census-date locking. Current Load calculates the student's enrollment load using the units from sessions the student is currently enrolled in as well as sessions within the term that the student has already completed. This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately. Finally, if you use census-date locking, you may want to use the census date locked value (FA Load) for any Pell recalculations that occur after the financial aid census date.

Note. If a term does not have a financial aid census date established, the Pell recalculation process uses the academic census date (defined in PeopleSoft Enterprise Student Records).

The fields that define your PEC setup are the Academic Base Weeks, Non-Standard Base Weeks, Pell Calculation Start, Pell Calculation Midterm, Pell Calculation Census, and Pell Number of Terms fields.

Financial Aid Defaults Page

First, you must establish your PEC setup on the Financial Aid Defaults page. Because the values you enter on this page are used as installation level defaults, the values you enter on this page should be the values you want to use for most (or all as appropriate) of your undergraduate programs. For the Academic Base Weeks and Non-Standard Base Weeks fields, enter the information that represents the standard weeks of instruction for terms in the Academic Award Period (AAP) and Non-Standard Award Period (NSAP), respectively. In the Pell Number of Terms field, enter the number of terms in the academic year—2 for semesters, 3 for trimesters/quarters. This value equals the number of terms in the AAP, but depends upon your institution's academic program business processes. The Packaging routine uses the Pell number of terms to split the Pell Grant evenly among terms when you choose either *Full Time* or *Half Time* for a Pell calculation field.

In the Pell Calculation Start field, enter *Full Time*, *Half Time*, *Current Load*, or *FA Load*. Entering *Full Time* or *Half Time* projects the student's enrollment as either full-time or half-time prior to the student's term start date. If you enter *Enrollment Current Load* or *Enrollment FA Load*, the Pell calculation uses actual enrollment information.

In the Pell Calculation Midterm field, enter *Enrollment Current Load* or *Enrollment FA Load* to use the student's actual enrollment information or enter *Full Time* or *Half Time* to project the students' financial aid load. If your students are enrolled in Open Entry/Open Exit sessions or your institution supports dynamic dating using Student Records, use *Enrollment Current Load* because this field value gives a precise picture of the student's academic progress through multiple sessions in a term.

In the Pell Calculation Census field, select *Enrollment FA Load*. This field value directs the Pell calculation to use the financial aid load calculated on or after the census date.

Careers That Vary from Installation Level Defaults

For careers that require a different PEC setup than specified on the Financial Aid Defaults page, create an aid processing rule set with the required PEC setup for those careers. You create aid processing rule sets on the Aid Processing Rule Setup page; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets on the Valid Careers for Aid Year page to only those careers that need a PEC setup that differs from the installation level default. If two careers require the same PEC setup (which differs from the installation level default setup), create only one aid processing rule set and assign it to both careers.

Note. You do not need to create an aid processing rule set for every career. You do not need to assign an aid processing rule set to every career on the Valid Careers for Aid Year page. If you do not specify an aid processing rule set on the Valid Careers for Aid Year page, the Packaging routine uses the installation defaults for PEC.

For example, you may want to create an aid processing rule set for a career that has academic program weeks of instruction greater or less than the standard weeks of instruction at the installation default level. On the Aid Processing Rule Setup page, you would specify the values for the weeks of instruction in the Academic Base Weeks and Non-Standard Base Weeks fields for these careers. Fill out all fields in the aid processing rule set.

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Creating Aid Processing Rule Sets, page 21](#)

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Academic Programs That Vary from Career Level Defaults

For academic programs that require a different PEC setup than specified at the career or installation level, create an aid processing rule set with the required PEC setup. Then you assign aid processing rule sets to only those academic programs that require a PEC setup different from the career or installation level default on the Valid Programs for Aid Year page. If two academic programs require the same PEC setup, create only one aid processing rule set and assign it to both academic programs.

For programs, the Pell number of terms that you enter on the Aid Processing Rule Setup page must match the Pell number of terms at the career level.

Note. You do not need to create an aid processing rule set for every career/program combination. You do not need to enter every program on the Valid Programs for Aid Year page. If you do not specify an aid processing rule set on the Valid Programs for Aid Year page, the Packaging routine uses the career or installation level defaults for PEC.

Individual Students Requiring Overrides to Default Values

Access a student's Pell Calculation Eligibility Student Override page (Financial Aid, View Packaging Status Summary) and click on the Pell Calculation Override link after querying a student.

Status	<p>Select Active to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods.</p> <p>Select Inactive to use the PEC setup at FA installation, career, or program level. The other fields for PEC setup on this page correspond to those on the Financial Aid Defaults page</p>
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Note. For a complete description of the PEC Student Override page:

See [Chapter 27, "Preparing for Awarding and Packaging," Overriding Pell Eligibility Calculation Setup Values, page 962.](#)

See Also

[Chapter 19, "Managing Financial Aid Terms," Overriding Census Date Locking, page 515](#)

Calculating Pell Grants

When the Packaging routine calculates the student's Pell Grant (whether you are packaging the student using Manual Packaging, Auto Packaging, or Mass Packaging), it first determines the PEC setup values to use. Because PEC setup defaults can be at the program, career, or installation level, the Packaging routine checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Aid processing rule set associated with the student's program.
2. Aid processing rule set associated with the student's career.
3. Installation defaults specified on the Financial Aid Defaults page.

Note. If the student has override values, those values take precedence over all other default values.

After determining the correct PEC values to use, the Packaging routine compares the current (system) date against the term start date (earliest session start date) and the financial aid census date. After the Packaging routine identifies the current date in relation to these dates, it calculates the student's Pell Grant term by term using the enrollment specified in the appropriate Pell calculation field (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census). Using the Pell COA, Pell LTHT or alternate Pell COA, appropriate weeks of instruction, the student's nine-month EFC, and the appropriate Pell Grant disbursement Schedule based on the enrollment value, the routine determines the term Pell Grant amount for the student.

The Packaging routine repeats this process for each term in the student's academic program, and adds the individual term amounts to determine the student's annual Pell award. For the *Enrollment Current Load* and *Enrollment FA Load* values, the routine disregards the split codes assigned to the Pell Grant financial aid item type and returns a split code of XX to indicate a custom split. For the *Full Time* and *Half Time* values, the routine derives a per term award amount by determining the annual Pell award using the appropriate Pell Grant disbursement schedule and dividing that amount by the Pell Number of Terms value.

Example

A student attends a semester-based institution, and is an undergraduate in the liberal arts academic program. Neither the student's program nor career have defaults that differ from the installation defaults. The student's annual Pell COA is 5,450.00 and the primary EFC is 154.00. According to the Federal Pell Grant Schedule, the student receives an annual award of 3,150.00 if enrolled full-time, an annual award of 2,363.00 if enrolled three-quarter time, and an annual award of 1,575.00 if enrolled half-time.

The student is first awarded a Pell Grant on March 1, 2000. To calculate the student's Pell Grant amount, the Packaging routine first determines whether PEC setup values exist at the student override level and then the academic program level for the student. After the routine determines that no aid processing rule set is attached to the liberal arts academic program, it checks for career level defaults. Because no aid processing rule set is assigned to the undergraduate career, it uses the installation defaults. The Pell calculation fields on the Financial Aid Defaults page have the following values:

Field	Value
Pell Calculation Start	Full-Time
Pell Calculation Midterm	Full-Time
Pell Calculation Census	Current Load

The Packaging routine now compares the current date (March 1, 2000) against the term start date and census date to determine which enrollment value to use when calculating the student's Pell Grant:

Term	Term Start Date	FA Census Date
Fall (0410)	09/17/00	10/20/00
Spring (0430)	01/23/01	03/10/01

Because the current date is before the term start date for both semesters, the Packaging routine uses the Pell Calculation Start value for enrollment, *Full-Time*. The student's Pell Grant award is 3,150.00 for the aid year, with a term amount of 1,575.00 for both terms.

The following table shows how the student's Pell Grant award changes as you recalculate the student's Pell Grant eligibility at different points in the aid year. The student's current load value after the census date is three-quarter time in fall and is half-time in spring. All amounts are in :

Current Date	Pell Calculation Field Used - Fall	Load	Fall Pell Award Amt	Pell Calculation Field Used - Spring	Load	Spring Pell Award Amt	Total Pell Award
03/01/00	Pell Calculation Start	Full Time	1,575.00	Pell Calculation Start	Full Time	1,575.00	3,150.00
09/20/00	Pell Calculation Midterm	Full Time	1,575.00	Pell Calculation Start	Full Time	1,575.00	3,150.00

Current Date	Pell Calculation Field Used - Fall	Load	Fall Pell Award Amt	Pell Calculation Field Used - Spring	Load	Spring Pell Award Amt	Total Pell Award
10/25/00	Pell Calculation Census	Current Load (3/4 Time)	1,182.00	Pell Calculation Start	Full Time	1,575.00	2,757.00
01/30/01	Pell Calculation Census	Current Load (3/4 Time)	1,182.00	Pell Calculation Midterm	Full Time	1,575.00	2,757.00
03/25/01	Pell Calculation Census	Current Load (3/4 Time)	1,182.00	Pell Calculation Census	Current Load (Half Time)	787.00	1,969.00

Reinstating a Canceled Pell Grant Award

Before reinstating a previously canceled Pell Grant, you must change the custom split code from XX to a valid disbursement split code for the student. You can then click the Validation button to recalculate the Pell Grant amount. After you recalculate the Pell Grant amount, you must remember to post it before leaving the award entry page.

Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates

For the 2001 aid year and subsequent aid years, a student who has earned a bachelor's degree and is pursuing an initial teaching certification or licensing credential that does not lead to a graduate degree is eligible for a Pell Grant for that aid year. The Packaging process determines the eligibility for this type of student by evaluating the following fields:

Record	Field	Description
ISIR_STUDENT	DEGREE_CERTIF	The degree or certification the student is pursuing. The student must be pursuing a teaching credential.
ISIR_STUDENT	FIRST_BACH_DEGREE	Indicates whether the student has a bachelor's degree. The student can have earned a bachelor's degree.

<i>Record</i>	<i>Field</i>	<i>Description</i>
STUDENT_FA_TERM	NSLDS_LOAN_YEAR	The NSLDS loan year for the student. Eligible students cannot be graduate students.

If a student is pursuing a teaching credential and has a bachelor's degree and the student's NSLDS loan year is not graduate, then the Packaging process evaluates the student for a Pell Grant for the 2001 aid year and subsequent aid years.

If a student is *not* pursuing a teaching credential but has a bachelor's degree and the student's NSLDS loan year is not graduate, then the Packaging process does *not* evaluate the student for a Pell Grant for the 2001 aid year and subsequent aid years.

Awarding Pell Grants for the 2010 and Future Aid Years

This section provides an overview of Pell Grant awarding for the 2010 and future award years and discusses how to:

- Define Pell eligibility calculation setup.
- Define Aggregate Aid Limit Percentage Maximums for Pell Grant.
- Calculate Pell Grants.
- Repackage Pell Grants.
- Manually award Pell Grants.
- Award Pell Grants using professional judgment.
- Reinstate a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

Note. Beginning with the 2010 aid year, the system calculates Pell Grant differently from 2009 and prior aid years. This section discusses awarding Pell Grants for the 2010 and future aid years. For information on awarding Pell Grants for 2009 and prior aid years:

See [Chapter 29, "Awarding Pell Grants," Awarding Pell Grants for the 2009 and Prior Aid Years, page 1029.](#)

The Pell Grant awarding functionality automatically calculates a Pell Grant award based on a student's:

- Maximum Scheduled Award
- Pell Grant Formula and Enrollment

- Total Percent Used

Maximum Scheduled Award

The system determines a student's maximum scheduled Pell Grant (full-time, full-year Pell Grant award) by using:

- Expected Family Contribution (EFC)

The student's 9-month EFC from a valid Institutional Student Information Report (ISIR)

- Pell Grant Cost of Attendance (COA)

The student's Pell COA or Pell COA for Less-Than-Half-Time (LTHT)

Note. If the student is enrolled only in terms tied to the Academic Award Period, Packaging uses the Academic Pell COA for determining Pell Grant awards.

If the student is enrolled in terms tied to both the Academic and Non-Standard Award Periods, Packaging uses the Academic Pell COA for determining Pell Grant awards.

If the student is enrolled only in terms tied to Non-Standard Award Period, Packaging uses the Non-Standard Pell COA for determining Pell Grant awards.

See [Chapter 4, "Setting Up Student Budgets," Defining Budget Components, page 54.](#)

The system uses the student's EFC and Pell COA to determine the student's maximum scheduled Pell Grant award from the U.S. Department's Full-time Pell Grant payment schedule for the appropriate aid year.

Pell Grant Formula and Enrollment

These Pell Grant Formula options are available:

- Formula 1 — FA Load
- Formula 1 — Full-time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

Among the formula options, there are three enrollment values used:

- FA Load

The Financial Aid Term build process determines the student's FA Load using the units in the FA Taken field. The FA Load field can be locked using census-date locking. If you use census-date locking, you may want to use the census date locked value (FA Load) for any Pell recalculations that occur after the financial aid census date.

- **Current Load**

Current Load calculates the student's enrollment load using the units from sessions the student is currently enrolled (In Progress value from FA Term) in as well as sessions within the term that the student has already completed (Completed value from FA Term). This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately.

- **Full-time**

The student's full-time enrollment is assumed.

You can choose to calculate the student's Pell Grant eligibility using different default enrollment values for different points in time in relation to the term:

- before the term's start date,
- on or after the term's start date but before the financial aid census date, and
- on or after the financial aid census date.

Having different values for these three points in time gives you flexibility in calculating Pell Grant awards. For example, for Formula 1, you can calculate a student's Pell Grant using a projected full-time enrollment value for the period prior to the term start date. Then when the student's term begins, you can recalculate the student's Pell Grant award using the student's actual enrollment (FA Load).

Note. If a term does not have a financial aid census date established, the Pell recalculation process uses the academic census date (defined in Student Records).

See [Chapter 29, "Awarding Pell Grants," Defining Pell Eligibility Calculation \(PEC\) Setup, page 1038.](#)

See [Chapter 29, "Awarding Pell Grants," Pell Grant Formula Examples, page 1044.](#)

See [Chapter 29, "Awarding Pell Grants," Pell Grant Point in Time Examples, page 1048.](#)

Total Percent Used

The amount of Pell Grant the system can award a student also takes into account the percentage of a student's maximum scheduled Pell Grant award that has already been used. The system uses the Percent Scheduled Used from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to calculate the Total Percent Used.

The Percent Scheduled Used is populated by the NSLDS Data Push process but can also be overridden manually.

Since students can receive two maximum scheduled Pell Grant awards in a single award year, you must define the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

See [Chapter 29, "Awarding Pell Grants," Defining Aggregate Aid Limit Percentage Maximums for Pell Grants, page 1042.](#)

See [Chapter 29, "Awarding Pell Grants," Step 3, page 1043.](#)

Defining Pell Eligibility Calculation (PEC) Setup

You must complete the Pell eligibility calculation (PEC) setup for your Pell Grants to be properly calculated. PEC setup is done at the institution defaults level and be overridden at the academic career, academic program, and student levels.

The fields that define your PEC setup are:

- Academic Base Weeks
- Non-Standard Base Weeks
- Pell 3 Academic Weeks Only
- Pell Calculation Start
- Pell Calculation Midterm
- Pell Calculation Census
- Pell Number of Terms

Defining PEC at the Institution Level

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

Because the values you enter on this page are used as installation level defaults, they should be the values you want to use for most of your undergraduate programs.

Note. For a complete description of this page:

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13.](#)

Academic Base Weeks	Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC). Valid values are 0.0 to 99.9.
Non-Standard Base Weeks	Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions. Valid values are 0.0 to 99.9.

Pell 3 Academic Weeks Only Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction.

Note. An Academic Program's Weeks of Instruction serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3 — FA Load, Formula 3 — Current Load, and Formula 3 — Full-time Load.

Pell Calculation Start Enter the calculation mode to use for Pell calculations made before the student's academic term start date. Use these values for the 2010 and future aid years:

Formula 1 — FA Load (For use only with 2010 and future aid years): Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses the student's actual FA Load for each term.

Formula 1 — Full-time (For use only with 2010 and future aid years): Directs the Pell calculation to divide the Scheduled Pell Grant by the Pell Number of Terms and uses full-time as the student's FA Load for each term.

Formula 3 — Current Load (For use only with 2010 and future aid years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

Formula 3 — FA Load (For use only with 2010 and future aid years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Formula 3 — Full-time Load (For use only with 2010 and future aid years): Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Pell Calculation Midterm

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

- Pell Calculation Census** Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.
- Pell Number of Terms** Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you select *Formula 1 - FA Load* or *Formula 1 - Full-time*, you must populate the Pell Number of Terms field.
- Valid values are 0 to 99.

Overriding PEC at the Career Level

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup) and the Valid Careers for Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

Note. For a complete description of the Aid Processing Rule Setup page:

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Creating Aid Processing Rule Sets, page 21](#).

Note. For a complete description of the Valid Careers for Aid Year page:

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Listing Valid Careers for the Aid Year, page 24](#).

For careers that require a different PEC setup than specified on the Financial Aid Defaults page, create an aid processing rule set with the required PEC setup for those careers. You create aid processing rule sets on the Aid Processing Rule Setup page; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets on the Valid Careers for Aid Year page to only those careers that need a PEC setup that differs from the installation level default. If two careers require the same PEC setup (which differs from the installation level default setup), create only one aid processing rule set and select it for each career.

Note. You do not need to create an aid processing rule set for every career. You do not need to assign an aid processing rule set to every career on the Valid Careers for Aid Year page. If you do not specify an aid processing rule set on the Valid Careers for Aid Year page, the Packaging routine uses the installation defaults for PEC.

For example, you may want to create an aid processing rule set for a career where the Base Weeks of Instruction is greater or less than the Base Weeks of instruction at the installation default level. On the Aid Processing Rule Setup page, you would specify the values for the weeks of instruction in the Academic Base Weeks and Non-Standard Base Weeks fields for these careers. Fill out all fields in the aid processing rule set.

Overriding PEC at the Program Level

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup) and the Valid Programs for Aid Year and Career page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year).

Note. For a complete description of the Aid Processing Rule Setup page:

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Creating Aid Processing Rule Sets, page 21](#).

Note. For a complete description of the Valid Programs for Aid Year and Career page:

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Defining Valid Programs for Aid Year and Career, page 25](#).

For academic programs that require a different PEC setup than specified at the career or installation level, create an aid processing rule set with the required PEC setup; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets to only those academic programs that require a PEC setup different from the career or installation level default on the Valid Programs for Aid Year page. If two academic programs require the same PEC setup, create only one aid processing rule set and assign it to both academic programs.

For programs, the Pell number of terms that you enter on the Aid Processing Rule Setup page must match the Pell number of terms at the career level.

Note. You do not need to create an aid processing rule set for every career/program combination. You do not need to enter every program on the Valid Programs for Aid Year page. If you do not specify an aid processing rule set on the Valid Programs for Aid Year page, the Packaging routine uses the career or installation level defaults for PEC. For example, if an Academic Program supports a Leading Summer term, you want to create a unique PEC that distinguishes it from an Academic Program that does not support a Summer Term

Overriding PEC at the Student Level

Access a student's Pell Calculation Eligibility Student Override page (Financial Aid, View Packaging Status Summary) and click on the Pell Calculation Override link after querying a student.

Note. For a complete description of the Pell Calculation Eligibility Student Override page:

See [Chapter 27, "Preparing for Awarding and Packaging," Overriding Pell Eligibility Calculation Setup Values, page 962](#).

Status

Select *Active* to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods.

Select *Inactive* to use the PEC setup at FA installation, career, or program level.

The other fields for PEC setup on this page correspond to those on the Financial Aid Defaults page.

Note. In the Pell calculation fields, if you select Formula 1 - FA Load or Formula 1 - Full-time, you must populate the Pell Number of Terms field. If you select Formula 3 - FA Load, Formula 3 - Current Load, or Formula 3 — Full-time Load, you must populate the Academic or Non-Standard Base Weeks fields.

See Also

Chapter 19, "Managing Financial Aid Terms," Overriding Census Date Locking, page 515

Defining Aggregate Aid Limit Percentage Maximums for Pell Grants

You must define the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

Access the Aggregate Aid Limits page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits).

Note. For a complete description of this page:

See Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13.

First Pell Percentage Enter *100.00* to ensure students are fully awarded a Pell1. If you enter any value less than 100.00, students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 awards) from this field.

Second Pell Percentage Enter *200.00* to ensure students are fully awarded a Pell2. If you enter any value less than 200.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 and Pell2 awards) from this field.

Calculating Pell Grants

The section discusses how Pell Grants are calculated and includes example calculations.

The system can award two full Pell Grants consecutively by term, First Pell (Pell1) and Second Pell (Pell2), to eligible students in a single aid year. As part of the Pell Eligibility Calculation (PEC), the system determines a student's Maximum (Max) Scheduled Award and uses this value to determine maximum Pell eligibility for the aid year. The system does not consider and does not award Pell2 until the student has been awarded Pell1 in the amount of his or her Max Scheduled Award.

Note. The system does not attempt to calculate a Pell Grant award for a student who has neither a federal nor an institutional application for the applicable aid year in the system. However, the system does attempt to calculate a Pell Grant award for a student who has an institutional application, but no federal application, for the applicable aid year in the system.

Step 1

The first step for Packaging (Manual Packaging, Auto Packaging, Repackaging, Mass Packaging, or Batch Repackaging) to calculate a student's Pell Grant award is to determine the Pell Eligibility Calculation (PEC) setup values to use. Because PEC setup defaults can be at the program, career, or installation level and can be overridden at the student level, Packaging checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Student override values.
2. Aid processing rule set associated with the student's program.
3. Aid processing rule set associated with the student's career.
4. Installation defaults specified on the Financial Aid Defaults page

Once PEC values are detected, the checking for defaults is done and those values are used.

Step 2

The second step is to compare the current (system) date to the term start date (earliest session start date) and the financial aid census date. After identifying the current date in relation to these dates, Packaging uses this date to determine which PEC Pell formula and enrollment values to use (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census).

Step 3

The third step is to determine the percentage of the student's max scheduled Pell Grant award that has been used. Determining what percentage of a student's Max Scheduled Award has been used is integral to how the system awards Pell Grant.

To accurately calculate a student's remaining Pell eligibility, Packaging uses Percent Scheduled Used field on the Aggregate Aid Data page. This field is populated either by the NSLDS Data Push process or manually overridden.

Note. Note: You must regularly push NSLDS data to the Aggregate Tables in order for Packaging to calculate accurately the student's remaining Pell eligibility against the Max Scheduled Award.

Access the Aggregate Aid Data page (Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data).

For a complete description of the Aggregate Aid Data page:

See [Chapter 27, "Preparing for Awarding and Packaging," Updating Aggregate Aid Information, page 966.](#)

Percent Scheduled Used Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 200.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS).

Override	Select this check box to manually override the Percent Scheduled Used value
Total % Used	Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.
	<hr/> Note. The system uses these internal fields (not displayed on any pages) to calculate Total % Used: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), student's remaining Pell Grant eligibility, and Max Scheduled Award minus Percent Scheduled Used. <hr/>

See [Chapter 27, "Preparing for Awarding and Packaging," Updating Aggregate Aid Information, page 966.](#)

Step 4

The fourth step is to use the identified Pell Grant formula with the appropriate Pell Grant Payment Schedule based on the enrollment load value, the student's Maximum Scheduled Award, the appropriate weeks of instruction or Pell Number of Terms, and the student's Total Percent Used (of Pell) to calculate the Pell Grant award term by term.

The Packaging routine repeats this process for each term in the student's academic program, and adds the individual term amounts to determine the student's annual Pell Grant award.

Pell Grant Formula Examples

The next four sections provide of examples of the Pell Formula calculations supported by the system:

- Formula 1 — FA Load
- Formula 1 — Full-Time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

See [Chapter 29, "Awarding Pell Grants," Defining Pell Eligibility Calculation \(PEC\) Setup, page 1038.](#)

Formula 1 — FA Load

The system divides the Pell Grant award by the Pell Number of Terms. It uses the student's FA Load value for each term to determine which Pell Grant schedule to use.

Pell COA = 5000.00 USD

EFC =02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Leading

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: 3/4

Annual Award: 3000.00 USD

Term 1 Actual Award: $2250.00 \text{ USD} / 2 = 1125.00 \text{ USD}$

Term 2 Actual Award: $2250.00 \text{ USD} / 2 = 1125.00 \text{ USD}$

Term 3 Actual Award: 750.00

The Term 3 Actual Award is calculated like this: $(2250.00 \text{ USD} / 2 = 1125.00 \text{ USD})$, THEN reduced to remaining eligibility: 3000.00 USD (Annual Award) minus 2250.00 USD (combined Term 1 and Term 2 Actual Awards) equals 750.00 USD.

Formula 1 - Full-Time

The system divides the Max Scheduled Award (full-time, full-year) by the Pell Number of Terms.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Trailing

FA Load Term 1: FT (Summer Term)

FA Load Term 2: FT

FA Load Term 3: FT

Annual Award: 3000.00 USD

Term 1 Actual Award: $3000.00 \text{ USD} / 2 = 1500.00 \text{ USD}$

Term 2 Actual Award: $3000.00 \text{ USD} / 2 = 1500.00 \text{ USD}$

Term 3 Actual Award: 0.00 USD

Student used entire Max Scheduled Award in Terms 1 and 2, leaving no remaining eligibility for Term 3.

Formula 3 - FA Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — FA Load uses the FA Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: FT

FA Load Term 3: FT

Term 1 Actual Award: $12 / 34 \times 2250.00 \text{ USD} = 794.03 \text{ USD}$

Term 1 Actual Award: $10 / 34 \times 3000.00 \text{ USD} = 882.30 \text{ USD}$

Term 1 Actual Award: $12 / 34 \times 3000.00 \text{ USD} = 1058.70 \text{ USD}$

Annual Award: 2735.03

Term 1 disb: 794.03 USD

Term2 disb: 882.30 USD

Term 3 disb: 1058.70 USD

Formula 3 - Current Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Current Load uses the Current Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The Current Load value uses the number of units that the student is currently enrolled in (Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics tab, Session Detail box, In Progress field) plus the number of units from completed sessions in the term to determine the student's load for the term.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: HT (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: HT

Term 1 Actual Award: $12 / 34 \times 1500.00 \text{ USD} = 529.35 \text{ USD}$

Term 2 Actual Award: $10 / 34 \times 2250.00 \text{ USD} = 661.73 \text{ USD}$

Term 3 Actual Award: $12 / 34 \times 1500.00 \text{ USD} = 529.35 \text{ USD}$

Annual Award: 1,720.43

Term 1 disb: 529.35 USD

Term 2 disb: 661.73 USD

Term 3 disb: 529.35 USD

Formula 3 - Full-time Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Full—time Load uses Full-time as the FA Load Value to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 36

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

Ignore student's actual enrollment and use Full-time Load for all terms

Term 1 Actual Award: $12 / 36 \times 3000.00 \text{ USD} = 1000.00 \text{ USD}$

Term 2 Actual Award: $10 / 36 \times 3000.00 \text{ USD} = 833.33 \text{ USD}$

Term 3 Actual Award: $12 / 36 \times 3000.00 \text{ USD} = 1000.00 \text{ USD}$

Annual Award: 2833.33 USD

Pell Grant Point in Time Examples

This section provides examples of how a Pell Grant can be calculated differently based on the PEC setup and different points in time in relation to the term start date:

- Before term start date
- Mid-term prior to term census date
- On or after term census date

A student attends a semester-based institution, and is an undergraduate in the liberal arts academic program. Neither the student's program nor career have defaults that differ from the installation defaults. The student's annual Pell COA is 5450.00 USD and the primary EFC is 00154; resulting in a Max Scheduled Award of 5,200.00 USD. The Pell Number of Terms is 2. According to the Federal Pell Grant Schedule, the student receives an annual award of 5200.00 USD if enrolled full-time, an annual award of 3900.00 USD if enrolled three-quarter time, and an annual award of 2600.00 USD if enrolled half-time.

The student is first awarded a Pell Grant on March 1, 2009. To calculate the student's Pell Grant amount, the Packaging routine first determines whether PEC setup values exist at the student override level and then the academic program level for the student. After the routine determines that no aid processing rule set is attached to the liberal arts academic program, it checks for career level defaults. Because no aid processing rule set is assigned to the undergraduate career, it uses the installation defaults. The Pell calculation fields on the Financial Aid Defaults page have the following values:

<i>Field</i>	<i>Value</i>
Pell Calculation Start	Formula 1 — Full-time
Pell Calculation Midterm	Formula 1 — Full-time
Pell Calculation Census	Formula 1 — FA Load

Packaging compares the current date (March 1, 2009) against the term start date and census date to determine which enrollment value to use when calculating the student's Pell Grant:

<i>Term</i>	<i>Term Start Date</i>	<i>FA Census Date</i>
Fall	09/17/09	10/20/09
Spring	01/23/10	03/10/10

Because the system date is before the term start date for both semesters, Packaging uses the Pell Calculation Start value for enrollment, *Formula 1 Full-time*. The student's Pell Grant award is 5200.00 USD for the aid year, with a term amount of 2600.00 USD for each term.

The following table shows how the student's Pell Grant award changes as you recalculate the student's Pell Grant eligibility at different points in the aid year. The student's current FA Load value after the census date is three-quarter time in fall and is half-time in spring.

Current Date	Pell Calculation Field Used - Fall	Load	Fall Pell Award Amt	Pell Calculation Field Used - Spring	Load	Spring Pell Award Amt	Total Pell Award
03/01/09	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
09/20/09	Pell Calculation Mid-term Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
10/25/09	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD
01/30/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD
03/25/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Census Formula 1 — FA Load	Half Time	1300.00 USD	3250.00 USD

See [Chapter 29, "Awarding Pell Grants," Defining Pell Eligibility Calculation \(PEC\) Setup, page 1038.](#)

Pell Grants for Non-standard Terms and Two Pell Grants in an Aid Year

To support Leading or Trailing Summer terms, the system can package a Pell Grant across both Academic and Non-Standard award periods. You should consider carefully the Disbursement Plan/Split Code being used to award Pell1 and Pell2. The system uses Disbursement Plans to determine for which terms to consider the student's Pell eligibility, but it does not use the Split Code nor Split Code Formulas as part of its distribution spread determination. Instead, the system uses either (a) Pell Number of Terms or (b) Academic plus Non-Standard Base Weeks to determine each term's award amount and how the award is spread across the enrolled terms.

Note. Although not used for Pell Grant awarding, the system still requires that you specify default Split Code and Split Code Formula values so that the fields are populated. These values are not used to distribute the Pell award into scheduled disbursements.

If your institution intends to award Pell Grants in either the Leading or Trailing Summer, you need to create Disbursement Plans that encompass all terms in which the student may receive a Pell Grant.

If the Academic Program supports a Leading Summer term, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring
- Quarter-based: Leading Summer, Fall, Winter, Spring

Example:

- Leading Summer Term: 2675.00 USD
- Fall Term: 2675.00 USD
- Spring Term: 0.00 USD

If the Academic Program supports a Trailing Summer term, create a new Disbursement Plan like this:

- Semester-based: Fall, Spring, Trailing Summer
- Quarter-based: Fall, Winter, Spring, Trailing Summer

Example:

- Fall Term: 2675.00 USD
- Spring Term: 2675.00 USD
- Trailing Summer Term: 0.00 USD

If the Academic Program supports both Leading Trailing Summer terms, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring, Trailing Summer
- Quarter-based: Leading Summer, Fall, Winter, Spring, Trailing Summer

Similar to awarding Leading or Trailing Summer terms, if you intend to award a Pell2 award in the succeeding term following a Pell1 award, you should use the same Disbursement Plan/Split Code pattern for both awards. Inherent logic in the system ensures that, based on the Disbursement Plan/Split Code being used, Packaging inserts a Pell2 award in the next available term following a Pell1 award.

Example — Leading Summer:

- Leading Summer Term: 2675.00 USD (Pell1)
- Fall Term: 2675.00 USD (Pell1)
- Spring Term: 2675.00 USD (Pell2)

Example — Trailing Summer:

- Fall Term: 2675.00 USD (Pell1)
- Spring Term: 2675.00 USD (Pell1)
- Trailing Summer Term: 2675.00 USD (Pell2)

The system supports the awarding of Pell1 and Pell2 awards in the same term up to the maximum Pell eligibility based on the student's enrollment for that term. For purposes of this example, the student:

- has an Incoming Aggregates Percentage of 65 percent, which leaves a remaining Pell1 eligibility of 1,855.
- is Half-Time for the Fall Term – scheduled max award of 2,650 / 2 = 1,325.
- is Full-Time for the Spring Term – scheduled max of 5,300 / 2 = 2,650
- is Full-Time for the Trailing Summer Term – scheduled max of 5300 / 2 = 2,650

Example — Pell1 and Pell2 in the same term:

- Leading Summer Term: 0.00 USD (No Enrollment)
- Fall Term: 1325.00 USD of Pell1 (based on the student's scheduled max award for that term's enrollment.)
- Spring Term: 2650.00 USD of Pell1 and Pell2 (530.00 USD of Pell1, based on the student's remaining Pell1 award of 1855.00 minus 1325.00 Fall Pell1 *and* 2120.00 of Pell2, based on the student's scheduled max award of Full-time for the term of 2650.00 minus the 530.00 of Pell1 already awarded.)
- Trailing Summer Term: 2650.00 USD of Pell2 (based on student's scheduled max award for that term's enrollment)
- Student receives both a 1855.00 USD Pell1 and a 4770.00 USD Pell2 for the award year.

Pell Grant Packaging Error Messages

The following table lists and explains possible Pell Grant Packaging error messages:

Message Number	Message Text
9022	PELL -Invalid Title IV eligibility indicator
9023	PELL - Not Title IV eligible

<i>Message Number</i>	<i>Message Text</i>
9026	PELL -Invalid NSLDS level
9027	PELL -Student is not an undergraduate, not PELL eligible
9033	PELL -Student has Bachelors degree, not PELL eligible
9136	Student Base Weeks or term count found to be 0 during PELL calculation
9148	PELL award cannot be assigned; there is no matching disbursement for term
9149	Not PELL eligible based on combination PELL Index and PELL COA
9150	Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'
9151	Item Type, Term, Aggregate, and/or Plan limits are less than PELL award
9152	PELL Index (Federal EFC) exceeds PELL Index maximum
9161	Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).
9185	Calculated PELL award exceeds aggregate eligibility; award rejected.
9214	Not Pell Eligible: The Student is a Graduate Student
9234	For 2010, Pell Calculation Start, Midterm and Census date entries are invalid
9236	Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%
9237	Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award

<i>Message Number</i>	<i>Message Text</i>
9405	PELL award reduced by Aggregate limits
9420	Manual Pell award reduced; For 2010, manual Pell cannot exceed eligibility

Repackaging Pell Grants

If your system

- has existing awards with a Disbursement Plan/Split Code that includes only Academic terms; and
- you want to tie these existing awards to a Disbursement Plan/Split Code that spans both the Academic and Non-Standard terms,

you cannot use a repackaging plan that incorporates the Repackaging Rule Validate Item Type for Pell item types. This is because Validate Item Type always uses the Disbursement Plan/Split Code tied to the existing award. You can use the Repackaging Rule Use Original Plan to repackage Pell Item Types that require a Disbursement Plan/Split Code change. If your institution does not intend to award Pell Grants in Leading or Trailing Summer terms, you can use the Repackaging Rule Validate Item Type for Pell item types.

Manually Awarding Pell Grants

If you manually award a Pell Grant that *exceeds* the Max Scheduled Award, the system reduces the award down to the Max Scheduled Award amount. Conversely, if you manually award a Pell Grant *for less than* the Max Scheduled Award, the system allows the award.

Note. When entering a Pell Grant manually on the Student Aid Package page, you can leave the award amount at zero. When you click the Validation button, the system automatically calculates the Pell Grant award according to the Pell eligibility calculation defined in your setup.

Awarding Pell Grants using Professional Judgment

Any amount of Pell Grant you award using Professional Judgment is accepted. Pell1 or Pell2 can exceed the Max Scheduled Award, the Total Percent Used value, and other Pell Grant awarding validations.

Reinstating a Canceled Pell Grant Award

Before reinstating a previously canceled Pell Grant, you must change the custom split code from XX to a valid disbursement split code for the student. You can then click the Validation button to recalculate the Pell Grant amount. After you recalculate the Pell Grant amount, you must remember to post it before leaving the award entry page.

Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates

A student who has earned a bachelor's degree and is pursuing an initial teaching certification or licensing credential that does not lead to a graduate degree is eligible for a Pell Grant for that aid year. The Packaging process determines the eligibility for this type of student by evaluating the following fields:

<i>Record</i>	<i>Field</i>	<i>Description</i>
ISIR_STUDENT	DEGREE_CERTIF	The degree or certification the student is pursuing. The student must be pursuing a teaching credential.
ISIR_STUDENT	FIRST_BACH_DEGREE	Indicates whether the student has a bachelor's degree. The student can have earned a bachelor's degree.
STUDENT_FA_TERM	NSLDS_LOAN_YEAR	The NSLDS loan year for the student. Eligible students cannot be graduate students.

If a student is pursuing a teaching credential and has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging evaluates the student for a Pell Grant.

If a student is *not* pursuing a teaching credential but has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging does *not* evaluate the student for a Pell Grant.

Chapter 30

Managing Self-Service Awards

This chapter discusses how to:

- Manage batch processing.
- Use administrative self-service inquiry pages.

Managing Batch Processing

This section provides an overview of managing batch processing and lists the pages used to manage batch processing.

Understanding Managing Batch Processing

If you select Batch as the processing option on the Awarding Options setup page, you must run batch processing to update the *Pending Update* status of the student's package. When you run the batch process and no errors are detected, the system posts the data from the staging tables to the final award tables in the database. When the student returns to the Award Package page, the outcome of the batch process results in one of the following statuses: *Successful*, *Successful with Adjustments*, *Revised Package*, *Rejected* or *Needs Review*. The student may need to meet with a financial aid counselor if the status is either *Rejected* or *Needs Review*. Consequently, the administrator must determine why the status is either *Needs Review* or *Rejected*, fix the condition, reaward the student as necessary, and rerun the batch process. If the status is *Revised Package*, the student may need to resubmit the changes.

If you set the Background Errors Allowed field to 1 or some other integer on the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation), the system ends the batch process when it encounters a single student or multiple students who receive either a *Needs Review* or *Rejected* status based on the tolerance.

Page Used to Manage Batch Processing

Page Name	Definition Name	Navigation	Usage
Self Service Batch Process	RUNCTL_FA_SS_AWARD	Financial Aid, Awards, Self Service Awarding, Post Self Service Awards, Self Service Batch Process	Run the FAPPKSSB process to update self-service award tables.

Using Administrative Self-Service Inquiry Pages

This section discusses how to:

- Use self-service activity.
- View self-service awarding activity details.
- Remove a student in needs review or rejected status.
- View self-service batch summary.
- View self-service requests.

Pages Used to View Administrative Self-Service Activity

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Self-Service Activity	FA_SS_AWD_ACT_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Activity, Self Service Activity	Identify sequential outcomes of submit activity that occurs in the student's self-service record.
Self Service Awarding Activity Detail	FA_SS_AWD_INQ_SEC	Click the link below the Date/Time field on the Self-Service Activity page.	View self-service awarding activity details. Use this page to view submitted awards and the award status for each career's awards for historical or audit purposes.
Self Service Batch Summary	FA_SS_BATCH_INQ	Financial Aid, Awards, Self Service Awarding, View Batch Summary, Self Service Batch Summary	View the total number of students processed in a batch and a breakdown of the number of students processed by self-service status.
Self Service Awarding Batch Detail	FA_SS_BATCH_DTL1	Click the numeric link with the corresponding status on the Self Service Batch Summary page.	View self-service awarding batch detail.
Self Service Awarding Batch Activity Detail	FA_SS_AWD_INQ_SEC2	Click the student ID link on the Self Service Awarding Batch Detail page.	View a specific student's self-service awarding activity detail as part of a batch run.
Self Service Awarding Batch Error	FA_SS_BATCH_ERROR	Click the Error Code link on the Self Service Awarding Batch Detail page.	View the error code with the corresponding message.

Page Name	Definition Name	Navigation	Usage
Request Counselor Action	FA_SS_AWD_REQ_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Requests, Request Counselor Action	Used by financial aid personnel to process the administrative requests submitted by the students.
Self Service Activity by Status	FA_SS_AWD_ACT_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Status, Self Service Activity by Status	Identify students by self-service status for which additional action might be warranted. You can access self-service activity by status by specifying a particular status in the search dialogue page. Select the student whom you want to review. Click the link below the Date/Time field to view the Self Service Awarding Activity Detail page.

Use Self-Service Activity

Access the Self-Service Activity page (Financial Aid, Awards, Self Service Awarding, View Self Service Activity, Self Service Activity).

Self-Service Activity

Jesse Martinez **ID:** SR13265

Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Customize Find View All		
Sequence	Date/Time	Status
3	2004-09-07-17.10.42.000000	Pending Update
2	2004-09-07-15.01.15.650000	Successful
1	2004-09-07-14.29.31.503000	Successful

Self-Service Activity page

Sequence

Indicates the chronological order of the student's self-service activity. You can update the student's self-service status using the Status field that corresponds with the highest sequence. For example, if the status is *Needs Review* or *Rejected*, fix the underlying problem, repackage as necessary, and change the status.

Date/Time

Displays the date and time of the self-service action.

Click a link to access the Self Service Awarding Activity Detail page.

Status

The processing option that you selected on the Awarding Options setup page affects the status. If you select Batch, the outcome is *Pending Update* until you run the batch process. After you run the batch process, the outcome can be *Successful*, *Successful w/Adjustments*, *Revised Package*, *Rejected*, or *Needs Review*. If you select Real Time, the outcome is *Successful*, *Successful with Adjustments*, *Rejected*, or *Needs Review*.

The status values are:

Needs Review: The system cannot process one of the student's awards. The system does not post the changes. If errors occur while the system is processing an award, the result is a *Needs Review* status. The system displays the awards as view only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

New Package: No previous self-service activity occurred and the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the awards that are currently available.

Pending Update: The student submitted the award acknowledgement. The student can revisit this page to determine the acknowledgement, changes, or both are accepted. The student can still make changes in his or her existing package if the status is *Pending Update*. The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run.

Rejected: The system cannot process the student's acknowledgment, adjustments, or both. The system does not post the changes. If errors occur during initialization and setup, the result is a *Rejected* status. All awards are rejected. The system displays the awards as view-only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

Revised Package: After a student submits an award acknowledgment, this status indicates that the financial aid staff revised the student's financial aid package since the student last submitted a transaction. The student can accept, reduce, or decline any or all of the awards that are currently available.

Successful: The system successfully processed the acknowledgement, changes or both submitted by the student.

Successful with Adjustment: The system successfully processed the student's award acknowledgment, but made adjustments to one or more awards. If the student reduced one or more awards below the minimum amount allowed, the system adjusts the awards to the minimum amount and returns this status.

Viewing Self-Service Awarding Activity Details

Use the Self Service Awarding Activity Detail page to view a student's award amounts and award statuses that resulted from a self-service award acknowledgment submission.

If an error occurs during real-time processing, the error link is available next to the status for the award that did not pass validation or posting. When you click the link, the system displays the message text for the error code.

Removing a Student in Needs Review or Rejected Status

If a self-service transaction results in a *Needs Review* or *Rejected* status, you can update the status for the most current transaction. If you are processing in real time, click the date/time stamp to view the Activity Detail page. If the Error link is available, click it to determine why the system set the status to *Needs Review* or *Rejected*.

If the error was caused by setup data, adjust the setup data and set the status to *Pending Update* on the Self-Service Activity page. Instruct the student to submit the acknowledgement again.

If the error was caused by award edits or the error link is unavailable, repack the student. This sets the self-service status to *Revised Package* the next time the student accesses the self-service page. Instruct the student to submit the acknowledgement again.

If you are processing in batch mode, access the Batch Summary page and click the numeric link to access students with a *Rejected* or *Needs Review* status. Click the Error Code link to determine the error. After you resolve the problem, access the Self-Service Activity page and set the status to *Pending Update*. Run the batch process again.

Viewing Self-Service Batch Summary

The Self-Service Batch Summary page displays the date and time that the batch process was run as well as the operator ID. It records the number of students processed and the number of students by self-service status. You can click the numeric link to identify the students with the corresponding status. If you set the Background Errors Allowed field to *1* on the Financial Aid Defaults page, the system ends the batch process when it encounters a single student who receives either a *Needs Review* or *Rejected* status.

The system also stores student IDs for each of the students processed. The sequence number for the corresponding self-service activity record (SS_FA_STDNT_HDR) is stored as a cross-reference. The system stores the item type, academic career, and error code that caused the package to fail (*Rejected* or *Needs Review*). When an error occurs, the system sets the package to *Rejected* or *Needs Review* without needing to process succeeding awards in the package. If the error is a data setup problem, then the system omits the item type and populates only the error code field. The administrator can review the package that resulted in either the *Rejected* or *Needs Review* status.

Viewing Self-Service Requests

Access the Administrative Requests page. Use this page to process administrative requests submitted by the student.

Seq Nbr (sequence number)	The chronological order of the student's self-service activity.
Request Type	The student requested <i>Change Request</i> , <i>Meeting Request</i> , or <i>Withdraw Application</i> .
User ID	The person who performed the action.
Status	Select <i>Canceled</i> , <i>Closed</i> , <i>Open</i> , <i>Pending</i> , or <i>Updated</i> .

Action Taken	Select <i>Cancel Aid, Meeting, No Action</i> , or <i>Repackage</i> .
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Chapter 31

Managing External Award Reporting

This chapter describes methods for entering and processing external award data into the core set of External Award Staging records. After external award transactions are posted to the External Award Staging table, you load external award transactions and finally post a new or updated award to the student award tables.

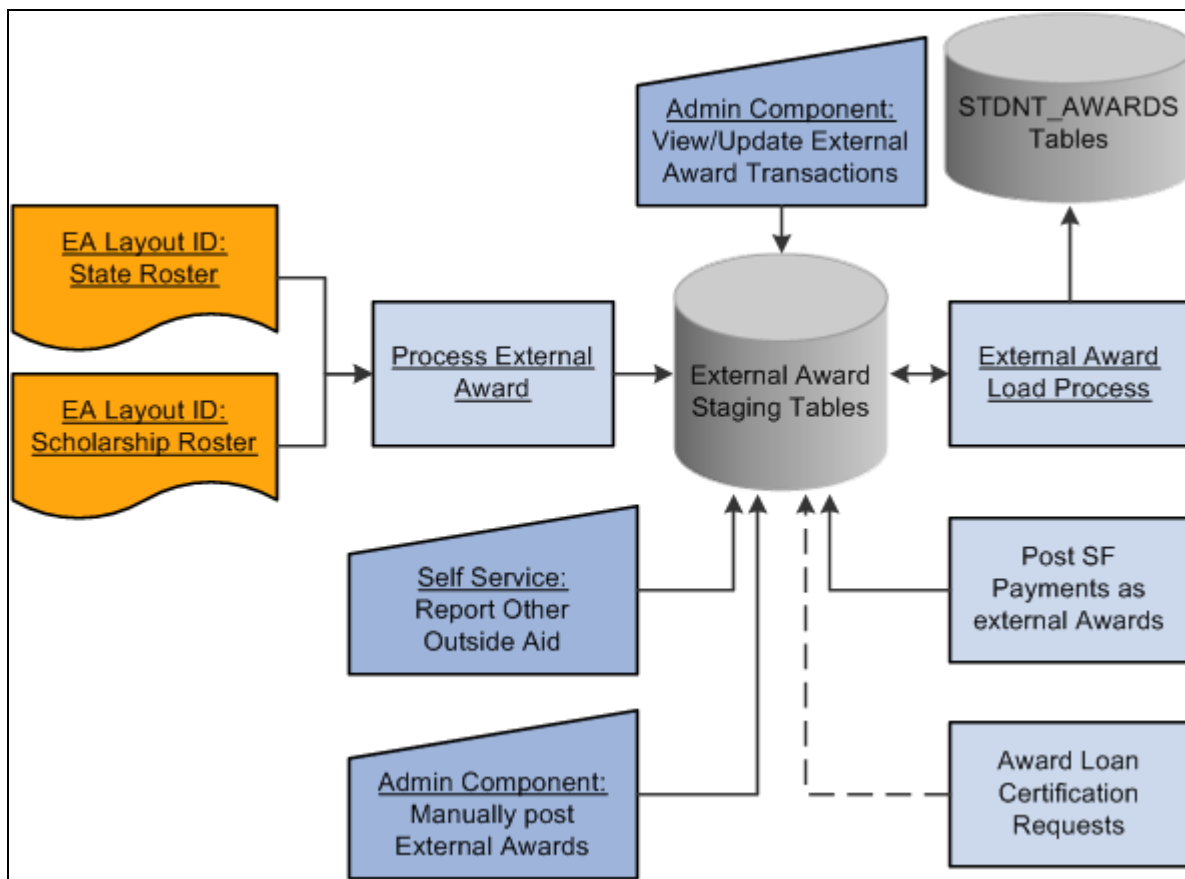
This chapter provides an overview of external award processing and discusses how to:

- Manually add external award data.
- Manage existing external award transactions.
- Process data from a file.
- Process Student Financial payments.
- Load data to the Student Award table.

Understanding External Award Processing

A core set of External Award Staging records maintain the external award transaction data. Each transaction is keyed with a set of values and has a processing status that indicates the loading of that transaction into the student award records.

The following diagram provides a high-level flow of the various data sources that update the core set of External Award Staging tables. After external award data or transactions have been updated to the staging tables, a separate External Award Load process is run to determine whether and how the external award data is to update the student award tables.



Flow of external award data

Manually Adding External Award Data

This section discusses how to:

- Add external awards by type.
- Add award disbursement details.
- Add external awards by student.
- View Award Summary.

Pages Used to Add External Award Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add External Awards by Type	SFA_EA_STAGE_ADD	Financial Aid, Awards, External Awards, Add External Awards by Type, Add External Awards by Type	Add an external award type and source to one or multiple students.
Award Disbursement Detail	SFA_EA_DISB_DTL1	Click the Award Detail link on the Add External Awards by Type page.	Add award disbursement details.
Add External Awards	SFA_EA_STAGE_STDNT	Financial Aid, Awards, External Awards, Add External Awards to Student, Add External Awards	Add one or more external awards for a single student.
View Award Summary	SFA_EA_AWARD_SUMVW	Financial Aid, Awards, External Awards, Add External Awards to Student, View Award Summary	View a student's award record and need summary totals to make an overall assessment before manually adding a new external award transaction.

Adding External Awards by Type

Access the Add External Awards by Type page (Financial Aid, Awards, External Awards, Add External Awards by Type, Add External Awards by Type).

Add External Awards by Type

Institution PSUNV PeopleSoft University **Aid Year** 2006-2007 PSUNV

Transaction Date **Transaction Nbr**

Award Type ☐ **Loan Certification**

Source

Program

Item Type Frank Lee Scholarship

*Student ID	Name	*Entry Code	Award Amount		
FAEA1001	Franklin,Susan H	Replace	2000.00	Award Detail	
FAEA1042	Baba,Katherine J	Replace	425.00	Award Detail	
FAEA1004	Dennison,Matt G	Replace	1700.00	Award Detail	

Add External Awards by Type page

Use this page to quickly enter external awards with the same external award attributes, such as a list of students who are recipients of a graduate departmental award. You can identify the attributes or directly indicate item type and then list the student IDs and award amounts. You can also enter specific award details beyond the annual award amount.

Award Type (Optional) Select an award type defined on the External Award Type page. The financial aid item types associated with the combination external award type and source on the External Award Cross Reference setup page are displayed in the Item Type lookup.

Source (Optional) Select an award source defined on the External Award Source page. The financial aid item types associated with the combination external award type and source on the External Award Cross Reference setup page are displayed in the Item Type lookup.

Program (Optional) Use if more than one program is defined for a source.

Item Type (Optional) If you entered an award type and source, select an associated item type. If you did not enter an award type and source, your list of item types displays all active item types for this aid year.

Note. You can specify either the item type or the award type and source (and program). To save the data on the page, select one.

Loan Certification

If this external award is a School Loan Certification Request, select this check box. When this check box is selected, the Related Item Type field appears:

- If your Loan Certification Request is for a Stafford loan, select a related item type that evaluates both subsidized and unsubsidized Stafford item types. The External Award Load process evaluates federal need eligibility, as if awarding a subsidized and unsubsidized Stafford loan on the standard award entry pages.
- If your Loan Certification Request is for a federal PLUS or alternative loan, identify the item type.

Note. Identify an external award as a Loan Certification only after you have completed the necessary steps to process School Certification Request Applications for CommonLine. If the external award process determines the student's loan eligibility and successfully posts a loan award, then continue to process the loan certification according to the steps outlined in the "Processing CommonLine Loans" chapter.

See [Chapter 7, "Setting Up External Awards," page 203.](#)

See [Chapter 36, "Processing CommonLine Loans," page 1257.](#)

Entry Code (Reporting code in the record layout)

(Required) Determines how transaction data is posted to the student's award package. Values are:

- *Append:* Use to increase an existing award. Append transactions can increase annual award amounts to specific disbursement ID amounts. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if Entry Code were *New*.
- *New:* Use for external awards reported once each aid year. If the item type to be posted already exists, the External Award Load process sets the transaction to *Error*.
- *Replace:* This is the default value when you are entering transactions manually. Use this value to change an existing annual and disbursement details of an award. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if the Entry Code value is *New*.

Award Amount

(Optional) Enter the annual amount of the award in U.S. dollars and cents. The Entry Code value determines how the amount affects an existing award.

Award Detail

Click the Award Detail link to access the Award Disbursement Detail page.

Adding Award Disbursement Details

Access the Award Disbursement Detail page (click the Award Detail link on the Add External Awards by Type page).

Award Disbursement Detail

ID

FAEA1020

Gilly,Bonnie E

Description

Award Amount

2,000.00

Disbursed Amount

0.00

Academic Career

Undergraduate

Disbursement Plan

☐

Split Code

☐

Customize | Find |

First 1 of 1 Last

Disb Nbr	Disb ID	Scheduled Award	Disbursed Amount	Term	
		0.00			<input type="button" value="+"/> <input type="button" value="-"/>

Comments

☐ Visible in Self Service

OK

Cancel

Award Disbursement Detail page

Use this page to enter additional details relevant to the external award transaction.

- Description

Enter a description of the external award to display on student self-service pages.
- Award Amount

(Optional) Enter the annual amount to be posted. If scheduled disbursement amounts are provided, the cumulative scheduled disbursement amounts must equal the annual award amount. If this field is blank, and scheduled disbursement detail is provided, then the annual award amount is assigned the sum of scheduled disbursement amounts.

Disbursed Amount	<p>(Optional) Enter the total disbursed amount to be posted. If disbursement detail amounts are provided, the cumulative amounts must equal the disbursed amount. If this field is blank and disbursement detail is provided, then Disbursed Amount is assigned the sum of the disbursement detail amounts. The Disbursed Amount field appears based on row order after the external award information is saved.</p> <hr/> <p>Note. Disbursed Amount is updated only when the item type has a Disburse Method value of <i>No</i>.</p> <hr/>
Academic Career	The student's active career appears by default. If the student has multiple careers within an aid year, select the career to which the external award should be posted.
Disbursement Plan	<p>(Optional) If provided, then the disbursement plan (DP) is used. If the DP is not provided, the default DP from the item type's career default DP/Split Code (SC) is used. If the default DP/SC does not work with the student's active term enrollment, the External Award Load process attempts to locate an appropriate DP/SC based on the student's active term enrollment.</p> <p>If a DP/SC is not found, the External Award Load process creates an error transaction. For Replace/Append transactions, this must be the same value used on the posted (noncanceled) award.</p> <hr/> <p>Note. A split code does not need to be provided if a Disbursement Plan code is provided. Providing only a Disbursement Plan code allows the External Award Load process to establish the term disbursement structure and define the specific distribution based on amounts provided in the transaction.</p> <hr/>
Split Code	(Optional) If provided, this split code is used to determine the disbursement split formula. Split code is set to XX if disbursement data is provided on the External Award transaction.
Disb Nbr (disbursement number)	System assigned. After the external award information is saved, Disb Nbr appears based on row order. It is the award disbursement to be processed for this external award transaction.
Disb ID (disbursement ID)	(Optional) If known, the disbursement ID allows for specific award disbursement detailed amounts to be processed. It is typically used to append a disbursement amount to a specific disbursement ID on an existing award.
Scheduled Award	The scheduled or allocated disbursement amount.
Disbursed Amount	<p>The disbursed or paid amount at the disbursement sequence level.</p> <hr/> <p>Note. The disbursed amount on the posted award is updated only when the item type has a Disburse Method value of <i>No</i>.</p> <hr/>
Term	(Optional) If provided, the External Award Load process determines whether the term is valid with the student's enrollment. If a disbursement ID value is not provided, then the first disbursement ID for that term is updated.
Comments	Enter a comment of any length.

- Visible in Self Service

Select to display this comment on the student's self-service page.
- OK

Click this button to save the entered information and return to the Add External Awards by Type page.
- Cancel

Click this button to delete any entered information and return to the Add External Awards by Type page.

If the External Award Load process is run for an append transaction that intends to update a disbursed amount and neither the Disb ID or Term field is specified on the Award Disbursement Detail page, an error message appears.

Note. The External Award process only allows item types that are non-disbursable to student accounts to be updated with disbursed amounts using the External Award process.

Adding External Awards by Student

Access the Add External Awards page (Financial Aid, Awards, External Awards, Add External Awards to Student, Add External Awards).

Add External AwardsView Award Summary

Dan Daniels

ID:FAEA1170

Aid Year:2007Financial Aid Year 2006 - 2007

Institution:PSUNV

Transaction Date:

Transaction Nbr:

FindView AllFirst1 of 1Last

Award Type

Source

Program

Item Type

Description

Amount0.00

Disbursed0.00

Disbursement Plan

Split Code

Paid in full

Loan Certification

*Entry CodeReplace

Academic CareerUndergraduate

Disbursements

CustomizeFind

First1 of 1Last

Disb Nbr	Disb ID	Scheduled Award	Disbursed Amount	Term	
		0.00	0.00		

Add External Awards page

Use this page to enter one or more external awards for a specific student.

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See Also

Chapter 31, "Managing External Award Reporting," Adding External Awards by Type, page 1063

Viewing Award Summary

Access the View Award Summary page (Financial Aid, Awards, External Awards, Add External Awards to Student, View Award Summary).

Add External Awards
View Award Summary

Dan Daniels
ID: FAEA1170

Aid Year: 2007 Financial Aid Year 2006 - 2007
Institution: PSUNV

Student Aid Package									
Nbr	Career	Item Type	Description	Category	Status	Offered	Accepted	Disb Plan	Split Code
						0.00	0.00		

Need Summary by Award Period						
Award Period	Total Aid (Fed)	Unmet Need (Fed)	Overaward (Fed)	Total Aid (Inst)	Overaward (Inst)	Unmet Need (Inst)
Academic	0.00	22,686.00	0.00	0.00	0.00	22,700.00
Non Standard	0.00	0.00	0.00	0.00	0.00	0.00

View Award Summary page

This page provides current award and need summary information. Use this page to estimate or anticipate the possible effect of an external award on a student's award package.

Managing Existing External Award Transactions

You can view transactions, correct data, and run the External Award Load process for a specific student using Manage External Award components. The pages in the component contain similar information, but vary by the search record used.

This section discusses how to:

- Manage external award data.
- Manage external award data by type.
- Manage external award data by status.
- View and load a student's external award data.

Pages Used to Manage Existing External Award Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage External Award Data	SFA_EA_STAGE_MGMT	Financial Aid, Awards, External Awards, Manage External Award Data, Manage External Award Data	View and update external award data in the External Award Staging table. Retrieve search results by transaction number, transaction date, source (external file, Self Service, manual entry, Student Financials, or loan certification file), or file mapping ID.
Award Disbursement Detail	SFA_EA_DISB_DTL	Click the Detail link on the Award tab of the Manage External Award Data page. Financial Aid, Awards, External Awards, Manage External Award Data	Enter additional details relevant to the external award transaction.
Manage External Award Data by Type	SFA_EA_STAGE_MGMT1	Financial Aid, Awards, External Awards, Manage External Awards by Type, Manage External Award Data by Type	View and update external award data in the External Award Staging table. Retrieve search results by the type categories entered in the External Award Type page.
Manage External Awards Data (by status)	SFA_EA_STAGE_MGMT3	Financial Aid, Awards, External Awards, Manage Awards by Status, Manage External Awards Data (by status)	View and update external award data. Retrieve search results by processing status.
External Awards	SFA_EA_STAGE_MGMT2	Financial Aid, Awards, External Awards, Manage Student External Awards, External Awards	View and update external award data by student. When you use the page to make a remote call of the External Award Load process for a specific student, only external award transactions with an Unprocessed status are loaded.
Award Summary	SFA_EA_AWARD_SUMVW	Financial Aid, Awards, External Awards, Manage Student External Awards, Award Summary	View all existing awards and need summary for a student.

Page Name	Definition Name	Navigation	Usage
Award Disbursement Detail	SFA_EA_DISB_DTL2	Click the Detail link on the Award tab of the Manage External Award Data page (Manage Student External Awards component).	Enter additional details that are relevant to the external award transaction.
Enter comments for this award	SFA_EA_COMMENT_SEC	Click the Comments link on the Status tab of the Manage External Award Data page.	Add a comment and optionally choose to display it on the student's self-service page.

Managing External Award Data

Access the Manage External Award Data page (Financial Aid, Awards, External Awards, Manage External Award Data, Manage External Award Data).

Manage External Award Data

Transaction Nbr

5

Date

10/16/2006

Data Source

Manual Add

User ID

PS

Student Count

1

Award Total

2,000.00

From Row

1

To Row

2

Row Count

2

Customize

Find

Student Information

Award

Status

	Status	EmplID	National ID	Last Name	First Name	Date of Birth	
1	Processed	FAEA1100		Linton	Dan	07/01/1984	[-]
2	Processed	FAEA1100		Linton	Dan	07/01/1984	[-]

Manage External Award Data page

This page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and has segmented all relevant external award fields into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all columns of data.

You can update the external award transaction until it has a status of *Processed* or *Adjusted*.

Student Information tab

Status

Indicates the status that is specific to an external award transaction Values are:

- *Adjusted*: System-assigned. Assigned during the batch External Award Load process if the transaction encountered a condition as noted in the Multi-Career batch run control option or the Term Mismatch batch run control option. Options allow transactions to be set to either *Adjusted* or *Error*.
- *Duplicate*: Either set manually or set when multiple transactions with the same attributes are found during the External Award Load process.
- *Error*: Transactions with an *Error* status have an accompanying Error code located on the Status tab. This status is assigned during the External Award Load process if an error occurred during the transaction.
- *Processed*: Assigned by the system to indicate a successful External Award Load run.
- *Reported*: Assigned to all new external awards with a Data Source value of *Self Service*.
- *Skip*: Based on the Search/Match option.
- *Suspend*: Based on the Search/Match option, Multi-Career batch option, or Term Mismatch batch option.
- *Unprocessed*: Indicates that no attempt was made by the External Award Load process. All transactions start with this value except student-reported aid (Self Service).

Award tab

Item Type

(Required) If this field is blank, the External Award Load process uses the External Award Item Type Cross Reference setup to determine the item type to be added or updated, based on the award type and source provided. If neither is provided or the item type is not found in setup, the External Award Load process returns an Error code of *Error* with accompanying Error Message *Code 606 (item type not found)*.

Rel Item (related item)

Available only when the Loan Cert check box is selected. Use to determine Stafford Subsidized and Unsubsidized eligibility. The related item type group should identify both a Subsidized and Unsubsidized Stafford item type for potential awarding.

Loan Cert (Loan Certification)	<p>Indicates a Loan Certification Request with a corresponding related item type group or item type. Loan Certification always uses an Entry Code value of <i>New</i>. If the item type to be posted already exists on the student's award record, the External Award Load process returns a status of <i>Error</i> with accompanying Error Message code 612 (Invalid Report Code of <i>New</i>.)</p> <p>If the Packaging process determines that the student is not eligible for the loan, the External Award process returns an error code of <i>Processed</i> with accompanying Error Message Code 646 (Student is not eligible for this award).</p>
Description	Appears on student self-service page to describe external award.
Detail	Click the Detail link to access the Award Disbursement Detail page.

Status tab

Entry Code (Reporting Code in the record layout)	<p>(Required) Used to determine how transaction data is posted to the student's award package.</p> <ul style="list-style-type: none"> • <i>New</i>: If the item type to be posted already exists, the External Award Load process sets the transaction to <i>Error</i>. Use for external awards reported once each aid year. • <i>Replace</i>: Default value when you are entering transactions manually. Use this value to change an existing annual amount and disbursement details of an award. If the item type to be posted does not already exist, the External Award Load process treats this transaction as if the Entry Code value is <i>New</i>. • <i>Append</i>: Use to add to an existing award. Append transactions can increase the annual award amounts, specific disbursement IDs, or both. If the item type to be posted does not already exist, the External Award Load process treats the transaction as if the Entry Code value is <i>New</i>.
---	---

Managing External Award Data by Type

Access the Manage External Award Data by Type page (Financial Aid, Awards, External Awards, Manage External Awards by Type, Manage External Award Data by Type).

Manage External Award Data by Type

Institution

PSUNV PeopleSoft University

Aid Year

2006-2007

Award Type

Grant

Source

CSAC

Transaction Nbr

3

Filter by

Processing Status

Reporting Code

From Row

To Row

Row Count

Customize | Find | View All |

First 1 of 1 Last

Student Information

Award

Status

Sequence	Status	*EmplID	National ID	Last Name	First Name	Date of Birth
1	Unprocessed	FAEA1020		Gilly	Bonnie	07/01/1978

Manage External Award Data by Type page

This page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and relevant external award fields are displayed in three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all columns of data.

You can update the external award transaction until it has a status of *Processed* or *Adjusted*.

You can filter results by processing status, entry code, or both.

See Also

Chapter 31, "Managing External Award Reporting," Managing External Award Data, page 1071

Managing External Award Data by Status

Access the Manage External Award Data (by status) page (Financial Aid, Awards, External Awards, Manage Awards by Status, Manage External Award Data).

Manage External Award Data

Institution PSUNV PeopleSoft University
Aid Year 2007 Financial Aid Year 2006 - 2007
Status Unprocessed

Transaction Nbr 3 **Date** 08/05/2006 **Data Source** Manual Add

From Row To Row Row Count 1

[Customize](#) | [Find](#)

Student Information						
Sequence	EmplID	National ID	Last Name	First Name	Date of Birth	
1	FAEA1020		Gilly	Bonnie	07/01/1978	

Manage External Award Data (by status) page

The Manage External Award Data (by status) page displays all external award transactions (sequence numbers) associated with the transaction number. Each row of data is associated with an EMPLID and all relevant external award fields are segmented into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

You can update the external award transaction until it has a status of *Processed* or *Adjusted*.

You can filter results by processing status, entry code, or both.

See Also

Chapter 31, "Managing External Award Reporting," Managing External Award Data, page 1071

Viewing and Loading a Student's External Award Data

Access the External Awards page (Financial Aid, Awards, External Awards, Manage Student External Awards, External Awards).

External Awards

Award Summary

Bonnie Gilly

ID: FAEA1020

Aid Year: 2007 Financial Aid Year 2006 - 2007

Institution: PSUNV

Aid Processing Status: Applied

Load

Filter by

Type Source Processing Status

EA Transaction

Award

Status

Trans Nbr	Seq	Status	Date	Data Source	External Award Type	Source	Program
4	1	Unprocessed	08/05/2006	Manual Add	Outside Aid	HR	WS
3	1	Unprocessed	08/05/2006	Manual Add	Grant	CSAC	A

External Awards page

This page displays all external award transactions for this ID. Each row of data is keyed by transaction number and sequence number. All relevant external award fields are segmented into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

You can update the external award transaction until it has a status of *Processed* or *Adjusted*.

You can filter results by type, source, and processing status.

See [Chapter 31, "Managing External Award Reporting," Managing External Award Data, page 1071](#).

Aid Processing Status
(Also known as Package Status)

Display-only field.

If the Aid Processing status is *Packaging Completed* and you click the Load button to run an online External Award Load process, the value changes to *Repackage*, making the student a candidate for the batch Repackaging process.

That is, this field is updated after you run the External Award Load process only if the prior status was *Packaging Completed*. You can change the status on this page. During the batch External Award Load process, use the Exclude Equation parameter to prevent selected IDs from having the status change to *Repackaging*.

See [Chapter 31, "Managing External Award Reporting," Loading Data to the Student Award Table, page 1085](#).

Load

Click the Load button to run the External Award Load process for all transactions for this student that have an *Unprocessed* status.

Processing Data from a File

This section lists prerequisites and discusses how to:

- Load external award data from a data file.

- View summary results of a file load.
- View award disbursement details.

Prerequisites

Before you load external data from an external data file:

- Define a mapping definition in the File Parser utility.
- Associate a Search/Match parameter set with the Mapping definition on the External Award Search Match Rules setup page.

Pages Used to Process Data from a File

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Award Staging Process	SFA_RUN_EA_STAGE	Financial Aid, Awards, External Awards, Process External Award File, External Award Staging Process	Load external award data from a data file into the External Award Staging table.
External Award File Summary	SFA_EA_STAGE_INQRY	Financial Aid, Awards, External Awards, View Data File Staging Results, External Award File Summary	View summary results of processing a data file into the External Award Staging table.
Award Disbursement Detail	SFA_EA_DISB_DTL3	Click the Disbursement link on the Award tab of the External Award File Summary page.	View award disbursement details.

Loading External Award Data from a Data File

Access the External Award Staging Process page (Financial Aid, Awards, External Awards, Process External Award File, External Award Staging Process).

External Award Staging Process

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

Parameters

*Institution

PSUNV

PeopleSoft University

*Aid Year

2007

Financial Aid Year 2006 - 2007

File Mapping ID:

EXT FILE_EA DATA

Customize | Find |

First 1 of 1 Last

File Path	File List Indicator		
	<input type="checkbox"/>	+	-

External Award Staging Process page

- File Mapping ID**

Select *File Mapping ID (Definitions)* created in *File Parser*. Only mapping definitions created with the External Award Context definition are available for selection.
- File Path**

Location of the external file or file list name.
- File List Indicator**

Select this option if you have created a file list to be loaded.

Viewing Summary Results of a File Load

Access the External Award File Summary page (Financial Aid, Awards, External Awards, View Data File Staging Results, External Award File Summary).

External Award File Summary

Institution	PSUNV PeopleSoft University	Aid Year	2006-2007
Transaction Nbr	5	Date	08/07/2006
Process Instance	521	Status	Processed
File Mapping ID	EXT FILE_EA DATA	Operator Id	PS
File Name	\\encdevshare02\sfst\Staff\Barbleatest_disbn01.csv		
Student Count	10	Award Total	11,996.00
Actual Count	10	Actual Total	11,996.00

From Row **To Row** **Row Count** 10

Student Information Award Status							
	Entry Code	Program	Item Type	Loan Cert	Career	Award Amount	
1	New		900000000200		UGRD	3,400.00	Disbursement
2	New		900000000200		UGRD	800.00	Disbursement
3	New		900000000200		UENG	112.00	Disbursement
4	New		900000000200		UGRD	700.00	Disbursement
5	New		900000000200		UGRD	800.00	Disbursement
6	New		900000000200		UGRD	100.00	Disbursement
7	New		900000000200		UGRD	1,521.00	Disbursement
8	New		900000000200		UGRD	1,521.00	Disbursement
9	New		900000000200		UGRD	1,521.00	Disbursement
10	New		900000000200		UGRD	1,521.00	Disbursement

External Award File Summary page

This page displays all external award transactions for this transaction number and specific file mapping ID. Each row of data is keyed by a transaction and sequence number. The displayed data has been read from an external data file and loaded into the External Award Staging tables. Fields are segmented into three grid tabs: Student Information, Award, and Status. Click the icon to the right of the tabs to display all three sets of fields.

To view disbursement details, click the Disbursement link on the Award tab. To check for errors, select the Status tab and then click the Error link to view the message number.

See [Chapter 31, "Managing External Award Reporting," Managing External Award Data, page 1071](#).

Process Instance	Generated by the Process External Award request.
Status	Displays the overall status associated with the loading of external data file.
Student Count	Represents the mapped total row count as read directly from the file. If this field value is not mapped, it is set to the Actual Count value.
Actual Count	The calculated count for rows with unique sequence numbers.

Award Total	Represents the total award amount for all transactions as read from the file. If this field value is not provided on the file, it is set to Actual Total value.
Actual Total	Calculated sum of award amount for all rows.

Viewing Award Disbursement Details

Access the Award Disbursement Detail page (click the Detail link on the Award tab of the Manage External Award Data page).

Award Disbursement Detail

IDFAEA1043Babcock,Nathan K

Award Amount1,521.00

Disbursed Amount1,521.00

Academic CareerUndergraduate

Disbursement PlanSplit Code

Customize Find					First	1-2 of 2	Last
Disb Nbr	Disb ID	Scheduled Award	Disbursed Amount	Term			
1	01	800.00	800.00				
2	02	721.00	721.00				

OK

Cancel

Award Disbursement Detail page

You can view the information on this page, but you cannot edit it.

See Also

Chapter 31, "Managing External Award Reporting," Adding Award Disbursement Details, page 1066

Processing Student Financial Payments

This section provides an overview and discusses how to receive Student Financials payments as external awards.

Understanding Student Financial Payments

Student Financial payments already posted to a customer account are not automatically recognized on a student's aid package. Payment transactions such as waivers, third-party credits, and direct payments must be accounted for and posted to a student's award package to ensure the true effect on a student's total financial aid package and financial need.

The Student Financial Award Feed process takes these steps:

- Selects students based on the Population Selection query and aid year entered on run control page.
- Evaluates payments or waivers from the (SF) PAYMENT_TABLE for the selected students.
- Focuses on (Financial Aid) item types identified on the run control page.
- Gathers (Student Financial) payments with external award attributes entered in the Item Type setup that are mapped to selected (Financial Aid) item types.
- Sums all (Student Financial) payments, both new and changed, by terms applicable to the aid year.
- Posts the summed term amount as an external award transaction to the appropriate (Financial Aid) item type.
- Posts the external award with an Entry Code value of *Replace* because all new and changed (Student Financial) payments are summed.

Page Used to Process Student Financial Payments

Page Name	Definition Name	Navigation	Usage
SF External Award Feed	SSF_RUNCTL_EXT_AWD	Financial Aid, Awards, External Awards, Process SF External Award, SF External Award Feed	Add external awards transactions based on Student Financial payments already posted to a student's account.

Receiving Student Financials Payments as External Awards

Access the SF External Award Feed page (Financial Aid, Awards, External Awards, Process SF External Award, SF External Award Feed).

SF External Award Feed

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Population Selection

Selection Tool: PS Query [Edit Prompts](#)

Query Name: QA_CS_FA_SF EA_UGRD [Launch Query Manager](#) [Preview Selection Results](#)

Parameters

Institution: PSUNV [PeopleSoft University](#)

Aid Year: 2007 [Financial Aid Year 2006 - 2007](#)

☒ Report Items by Group ☐ Report Specific Items

Item Type Group: [Item Type:](#)

SF External Award Feed page

The Student Financial External Award Feed process sends payments, waivers, and third-party credits associated with the financial aid item type or item group on the run control, based on the aid year and institution. When more than one business unit maps to the same institution, all eligible credits stored on the PAYMENT_TBL are evaluated for each business unit to report back to financial aid as an external award transaction.

Only students with valid FA_TERM records are considered. Aid year is associated with a payment by comparing the payment's term with the student's FA term record. Financial aid item types are mapped to the payment through the (Student Financial) Item Type setup for the payment, third-party credit, or waiver. If any change occurs in the student's eligible credits, all student credits mapping to the same (Financial Aid) item type for the term and aid year are evaluated to derive the full amount to be sent to the External Award staging tables. Changes are determined by comparing the Payment table payment amount to SSF_PMT_AMT_SENT, which contains the amount that was last sent to Financial Aid.

Note. Because the Student Financial External Award Feed derives the full amount, when any change is identified in the student's eligible credits, each external award transaction posted is updated with an Entry Code value of *Replace* to present the most current status of payments mapped to the appropriate (Financial Aid) item type.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Selection Tool Select *PS Query*. Depending on your selection, other fields are displayed.

Query Name Appears only when you select *PS Query*. Select a PS Query that selects a population using the bind record *SSF_EA_BIND*.

The Edit Prompt and Preview Selection Results links are available when you select *PS Query* and a query designated for the SF External Awards Feed process.

Note. Remember that the process runs more efficiently if you select the Distinct check box on the Query Properties page.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query*

Parameters

Report Items by Group Select to identify a range of (financial aid) item types to be evaluated. The Student Financial External Award process evaluates which Student Financial payments to include as an external award, based on the External Award Item Type Cross-Reference setup and the External Award attributes entered on the (Student Financial) item type setup.

Report Specific Items Select to identify a specific (Financial Aid) item type to be evaluated. The SF External Award process evaluates which SF payments to include as an external award, based on the External Award Item Type Cross-Reference setup and the External Award attributes entered on the (student financial) item type setup.

Item Type Group Select an item type group previously defined on the Item Type Group setup. Only item types in the Financial Aid category are considered and must be identified in the External Award Item Type Cross-Reference setup.

Item Type Select a financial aid item type.

Example of Reporting a Student Financial Payment as an External Award

The following table shows three Student Financial waivers mapped to the same financial aid item type, 900000000470. The Financial Aid office determines how much detail it needs to provide in a student's award package and therefore how many FA item types to use and whether a one-to-one or many-to-one relationship is established.

Financial Aid Item Type Mapped to a Student Financial Payment Item Type

<i>(FA) Item Type</i>	<i>Description</i>	<i>EA Type</i>	<i>EA Source / Program Code</i>	<i>(SF) Item Type</i>	<i>Description</i>
900000000470	Waiver	WVR	SF	350000010100	FA EA Waiver #1
900000000470	Waiver	WVR	SF	350000010200	FA EA Waiver #2
900000000470	Waiver	WVR	SF	350000010300	FA EA Waiver #3

<i>(FA) Item Type</i>	<i>Description</i>	<i>EA Type</i>	<i>EA Source / Program Code</i>	<i>(SF) Item Type</i>	<i>Description</i>
900000000471	General	TPC	SF/C	360000010010	FA EA TPC #1
900000000471	General	TPC	SF	3600000101020	FA EA TPC #2
900000000472	TPC Army	TPC	SF/A	360000010030	FA EA TPC #3
900000000473	Dept Scholarship	SCH	SF	320000000100	FAEA Dept Aid #1
900000000473	Dept Scholarship	SCH	SF	320000000200	FAEA Dept Aid #2
900000000473	Dept Scholarship	SCH	SF	320000000300	FAEA Dept Aid #3

After you determine a high-level mapping strategy, update the External Award Cross-Reference setup and the (SF) Item Type-External Award tab with the correct values.

Example of Student Financial Payment

This example shows payments posted in Student Financials and then reported as an external award in the External Award staging tables.

<i>Date</i>	<i>Activity</i>	<i>SF Item Type</i>	<i>Term</i>	<i>Amount</i>	<i>FA Item Type</i>	<i>Term</i>	<i>Amount</i>
09/01/2006	Post Tuition Waiver in Student Financials to fall 2006 (0570) term	350000010100	0570	510.00 USD			
09/03/2006	Post Tuition Waiver in Student Financials to fall 2006 (0570) term.	3500000010200	0570	100.00 USD			
09/03/2006	Post Department Scholarship directly to Customer Account by Student Financials office.	320000000100	0570	980.00 USD			
09/15/2006	Run Process SF External Award to create External Award transactions in External Award Staging tables.				900000000470 900000000473	0570 0570	610.00 USD 980.00 USD
12/01/2006	Post Tuition Waiver in Student Financials to spring 2007 (0580) term.	350000010100 350000010200	0580 0580	522.00 USD 100.00 USD			

Date	Activity	SF Item Type	Term	Amount	FA Item Type	Term	Amount
12/15/2006	Run Process SF External Award to create External Award transactions in External Award Staging tables.				900000000470	0570 0580	610.00 USD 622.00 USD

On September 15, 2006, the SF External Award process is run and two external award transactions are posted:

- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 510.00 USD and 350000010200 100.00 USD), which are combined as a total 0570 term amount of 610.00 USD.
- External award transaction for the financial aid item type 900000000473 is based on the SF posted department scholarship (320000000100 980.00 USD), which is posted as a total 0570 term amount of 980.00 USD.

On December 15, 2006, the SF External Award process is run and one external award transaction that represents the prior 0570 term amounts now contains the 0580 term Waivers Items.

- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 510.00 USD and 350000010200 100.00 USD), which are combined as a total 0570 term amount of 610.00 USD.
- External award transaction for the financial aid item type 900000000470 is based on combining the two different waiver items (350000010100 522.00 USD and 350000010200 100.00 USD), which are combined as a total 0580 term amount of 622.00 USD.

Loading Data to the Student Award Table

This section provides an overview and discusses how to:

- Load external awards in batch.
- View External Award Load summary data.

This section also lists external award error messages.

Understanding the External Award Load Process

The External Award Load processing takes these steps:

- Moves the data from the Staging Table to the Student Award table.
- For missing EmplIDs, ensures that students are active in the Campus Solutions database.
- Ensures that each student applied for financial aid for the given institution and aid year.
- Maps external awards to financial aid item types.

- Determines action to take for duplicate awards.
- Assigns a disbursement plan and split code for each award.
- Takes any necessary packaging actions.
- Posts error-free awards to the Student Award table.
- Updates Need Summary.
- Sends processing status and any accompanying error codes to the Staging table.

Pages Used to Load Data to the Student Award Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load External Awards	SFA_RUN_EA_LOAD	Financial Aid, Awards, External Awards, Load External Awards, Load External Awards	Evaluate external award transactions to post or update student award tables.
External Award Load Summary	SFA_EA_LOAD_HDR	Financial Aid, Awards, External Awards, External Award Load Summary, External Award Load Summary	View summary data, such as the number of students selected, processed, and skipped.
External Award Load Detail	SFA_EA_LOAD_DTL	Financial Aid, Awards, External Awards, External Award Load Detail, External Award Load Detail	View the status of each external award transaction processed during the External Award Load process.

Loading External Awards in Batch

Access the Load External Awards page (Financial Aid, Awards, External Awards, Load External Awards, Load External Awards).

Load External Awards

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

*Institution	<input type="text" value="PSUNV"/>		PeopleSoft University
*Aid Year	<input type="text" value="2007"/>		Financial Aid Year 2006 - 2007
*Status	<input type="text" value="Unprocessed"/>		
Data Source	<input type="text" value="External File"/>		
File Mapping ID	<input type="text" value="EXT FILE_EA DATA"/>		
Transaction Date	<input type="text"/>		Transaction Nbr <input type="text" value="5"/>
Award Type	<input type="text"/>	Source	<input type="text"/>
		Program Code	<input type="text"/>

Update Aid Processing Status

Exclude

Load Processing Rule

Term Mismatch	<input type="text" value="Error"/>
Multi-Career	<input type="text" value="Error"/>

Load External Awards page

Run control provides filtering parameters to focus the selection of external award transactions to be processed. Other parameters control how the Aid Processing status is updated and set rules that guide the External Award Load process when certain student conditions are encountered.

Report Request Parameters

Status	(Required) Select the processing status of external award transactions to be processed.
Data Source	(Optional) Select a value to narrow the selection of transactions to be processed. If you select <i>External File</i> , also select a specific file mapping ID to identify the Search/Match parameter rule.
File Mapping ID	(Optional) Select to narrow the selection of transactions to be processed. See Data Source.
Transaction Date	(Optional) Select a specific transaction date to narrow the selection of transactions to be processed.

Transaction Nbr (transaction number)	(Optional) Select a specific transaction number to narrow the selection of transactions to be processed.
Award Type	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.
Source	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.
Program Code	(Optional) Select an external award attribute value to narrow the selection of transactions to be processed.

Update Aid Processing Status

Exclude Select a group of IDs to exclude having the Aid Processing Status value change from *Packaging Completed* to *Repackage* after the External Award Load process finishes. These groups are defined using the Equation Editor (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

To decide whether to provide an equation for this option, consider how your institution identifies students as possible candidates for the batch Repackaging process. For example, if you identify all overaward students, regardless of the size of the overaward amount, you would not provide an equation in the Exclude option. If a student's aid package is updated with an external award and has an overaward greater than zero and Aid Processing Status is *Packaging Completed*, then the student's Aid Processing Status is changed to *Repackage*.

Or, if you identify students whose overaward is greater than 200.00 USD, you would use the Exclude option and an equation that identifies IDs with an overaward less than 201.00 USD.

Note. This option considers only students whose Aid Processing Status is *Packaging Completed* before the External Award Load is run. All other Aid Processing Status values remain unchanged.

Load Processing Rule

Term Mismatch

Select an action to take when a mismatch exists between the term on the external award disbursement data and the actual enrollment data. A term mismatch exists when a term defined on an external award transaction does not match a student's actual enrollment. If a term mismatch condition is met, this option instructs the External Award Load process to set the processing status to one of the following statuses:

- *Error*: Default. Set the processing status to *Error* and do not update the student's award package. This option is available only when you run the External Award Load process online.
- *Suspend*: Set the processing status to *Suspend* and do not update the student's award package.
- *Adjust*: Set the processing status to *Adjust*. The External Award Load process posts award disbursement data into the student's first Disbursement ID of Term.

Multi-Career

Select an action to take when a conflict exists between the career on the external award disbursement data and the actual enrollment data. A multicareer condition exists when a career defined on an external award transaction does not match a student's actual enrollment. If a multicareer condition is met, this option instructs the External Award Load process to set the processing status to one of the following statuses:

- *Error*: Default. Set the processing status to *Error* and do not update the student's award package. This option is available only when you run the External Award Load process online.
- *Suspend*: Set the processing status to *Suspend* and do not update the student's award package.
- *Adjust*: Set the processing status to *Adjust*. The External Award Load process posts award and disbursement data into the student's first career found.

Posted External Awards

All new or updated awards posted as a result of a successful External Award Load process are sequenced above existing awards, except for Loan Certifications, which are sequenced below all awards. New or updated awards are assigned an External Award lock attribute, which is displayed on the Student Aid Package page, Status tab. The lock prevents the award from being overwritten by the Auto or Mass Packaging and Repackaging processes.

Loan Certification Requests

Loan certification transactions are evaluated for eligibility. In the case of a Stafford Loan Certification with a Related item type identified on the external award transaction, if the existing package has already been awarded a subsidized or unsubsidized Stafford, the External Award Load process returns a status of *Processed* and an error message number 646 (*Student is not eligible for this award*).

Note. Loan Certification Requests awarded during the External Award process should be performed only for loan certification request applications that have already been inbound into the Loan component.

Auto-Cancel Awards

An external award posted with an Auto Cancel item type cancels the Auto Cancel item type and then sequences the external award immediately following the canceled award.

Viewing External Award Load Summary Data

Access the External Award Load Summary page (Financial Aid, Awards, External Awards, External Award Load Summary, External Award Load Summary).

External Award Load Summary			
Process Instance	526		
Institution	PSUNV	PeopleSoft University	Aid Year
			2006-2007
Processing Status	Unprocessed		
Data Source	External File		File Mapping ID
			103
Transaction Date		Transaction Nbr	5
Award Type	Source	Program Code	
Selected	10	Multi-Career Action	Error
Processed	9	Invalid Term Action	Error
Skipped	0	Exclusion Equation	
In Error	1		

External Award Load Summary page

The External Award Load Summary page lists the criteria used to select transactions to be processed. It also shows the selected, processed, skipped, and in error process counts. Verify that the criteria is correct and that the counts are correct. If transactions skipped or in error, use any of the Manage Existing External Award pages to correct wrong data and address any errors reported.

External Award Error Messages

The following table lists and explains possible External Award Load error messages. These messages are contained in Message Set Number 14402.

Message Number	Message Text	Message Explanation
601	Student is not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STUDENT_AID.
602	Student not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STDNT_AID_ATRBT.
603	Student not active for Aid Year specified.	Student is not active for Aid Year specified. No row found in PS_STDNT_AWD_PER.
604	No valid FA Term data found.	No valid FA Term data found. No rows found in PS_STDNT_FA_TERM.
605	More than one active academic career found.	More than one active academic career found.
606	Item Type not found.	Item Type not found. A valid Item Type for the external award could not be found. Check the external award type and source defined and the Item Type being used.
607	Item Type could not be assigned.	Item Type could not be assigned. Multiple values map to the specified external award type and source.
608	Invalid Disbursement Plan and Split Code.	Invalid Disbursement Plan and Split Code. The specified disbursement plan and split code would result in invalid disbursement rows for the student.
609	Unable to assign disbursement plan and/or split code.	Unable to assign disbursement plan, split code, or both. Multiple values meet student's attributes.
610	Invalid term specified.	Invalid item specified. The term specified on a disbursement entry is not a valid term for the student.
611	External Award Report Code not found.	External Award Report Code not found. The report code is required when the same item type has already been awarded.
612	Invalid Report Code (N = New).	Invalid or incorrect Report Code (N = New). This item type already exists in the student's award package and is therefore a duplicate entry.
613	Disbursement IDs not found for specified Disbursement Plan.	Disbursement IDs that correspond to student's term enrollment were not found for specified Disbursement Plan.

Message Number	Message Text	Message Explanation
614	Unable to create disbursement rows. SQL error on disbursement row insert.	Disbursement IDs that correspond to student's term enrollment were not found for specified Disbursement Plan.
615	Missing or invalid Disbursement ID for an Append or Replace transaction.	When using a Report Code of <i>Append</i> or <i>Replace</i> , the Disbursement ID was missing or invalid.
616	The sum of scheduled disbursements does not equal the total award amount.	The sum of scheduled disbursements does not equal the total award amount.
617	Unable to assign valid Disbursement IDs.	Unable to assign valid Disbursement IDs for the Term specified on the staging table.
618	Invalid Report Code for loan certification award.	Invalid Report Code used for loan certification award. Loan certifications must use a Report Code value of <i>New</i> .
619	Invalid Disbursement Plan for append transaction.	Invalid Disbursement Plan for append transaction. The Disbursement Plan for the append transaction must match the Disbursement Plan for the exiting award.
620	Invalid Disbursement Plan for replacement transaction.	Invalid Disbursement Plan for replacement transaction. The disbursement plan for the replacement award has to match the disbursement plan on the existing, non-zero award.
621	Invalid Disbursement Plan for replacement award.	Invalid Disbursement Plan for replacement award. The disbursement plan for the replacement award is different from the disbursement plan for the existing award and the existing award has non-zero authorized and/or disbursed balances.
622	Charge Priority not found for Item Type.	Charge Priority not found for Item Type.
623	Missing disbursement schedule.	Missing disbursement schedule. The disbursement information must be specified when adjusting or replacing an award with a Split Code value of XX (Custom Split).
624	Disbursement Term mismatch.	Disbursement Term mismatch. Unable to find a valid split code for disbursement allocation.
625	Invalid transaction amount.	Invalid transaction amount. The annual award amount, annual disbursement amount, or both is zero.

Message Number	Message Text	Message Explanation
626	External Award Load	Process completed successfully.
627	External Award Load ERROR	Award accept amount can never be negative on the Assign Fiscal Limits page.
628	External Award Load ERROR	SQL error encountered by FAPPKEAL. Check the log for details.
629	External Award Load ERROR	Application Engine program SFA_EA_LOAD encountered errors. Check the log for details.
630	External Award Load ERROR	The external award load process did not run to successful completion. Check the log for errors.
631	Record Insert Error.	Error creating Application Engine state record SFA_EALOAD_AET.
632	External Award Load ERROR	Error encountered during award Posting process (FAPPKPST).
633	External Award Load ERROR	Error encountered during award Validation process (FAPPKCTL).
634	Same award already exists with non-zero authorized and/or disbursed balances.	The loan certification award already exists with non-zero authorized, disbursed balances, or both.
635	Insufficient process run parameters.	Insufficient parameters. Institution, Aid Year, and Mapping ID are required to run the process.
636	Search/match parameter not found.	Search/match parameter not found. Unable to assign EMPLID.
637	Zero award amount. Award was not posted.	A new award with a zero amount cannot be posted.
638	Award Amount has been adjusted to reflect the Disbursed Amount.	Disbursed Amount is greater than the Award Amount. The award amount has been adjusted to reflect the disbursed amount.

Message Number	Message Text	Message Explanation
639	Invalid award amount for a Replace transaction.	The transaction award amount is zero, but the disbursed amount is non-zero. The award cannot be posted as it will replace the existing award with a zero award. A disbursement amount greater than the zero award amount cannot be processed.
640	Invalid number of disbursements specified.	The number of disbursements specified is greater than the number of scheduled disbursements for the disbursement plan on the existing award. Either fix the number of disbursements to match the existing award or choose a new disbursement plan. Note that a new disbursement plan can only be used if payments have not been made against the award and it has not been disbursed.
641	Missing or invalid Term for an Append or Replace transaction.	When using a Report Code of <i>Append</i> or <i>Replace</i> , the disbursement detail must have the correct terms specified when the disbursement IDs are not known. Otherwise, specify the disbursement IDs for all rows.
642	Missing or invalid Term.	When specifying the disbursement allocation, all entries must have the correct term specified if at least one allocation has a term defined. Otherwise, specify the Disbursement IDs or leave both the Disbursement ID and Term fields for all allocations blank.
643	Missing or invalid Disbursement ID.	When specifying the disbursement allocation, all entries must have the appropriate Disbursement ID specified if at least one allocation has a Disbursement ID defined. Otherwise, specify the Term instead or leave both the Disbursement ID and Term fields for all allocations blank.
644	Invalid disbursement allocation specified.	The disbursement allocation is invalid. The Disbursement IDs specified do not match the student's enrollment terms.
645	Invalid Disbursement IDs specified.	One or more Disbursement IDs do not match the Disbursement IDs for the Disbursement Plan assigned.
646	Student is not eligible for this award.	The award has been processed but it was not posted to the student's financial aid package. The student is not eligible for this award.
647	External Award Load error.	Error encountered during call to Equation Processor (FAPEQRUN).

Message Number	Message Text	Message Explanation
648	Sum of disbursed term amounts does not equal the total amount disbursed.	The sum of the disbursed balances in the disbursement detail does not equal the total amount disbursed.
649	Invalid amount specified. Amount is less than zero.	Invalid amount specified. Amount is less than zero.
650	Zero amount for Append transaction.	Zero amount for Append transaction. To set the award amount to zero, use an Entry Code value of <i>Replace</i> . Otherwise update the transaction to reflect the correct amount to append.
651	New award with zero amount not posted. This award cancels an existing award (auto-cancel).	The award was processed but was not posted to the student's financial aid package. The zero amount indicates student is not eligible for this award and canceled an existing award matching the auto-cancel item.
652	Disbursement detail is needed when appending to the Disbursed amount.	You must provide specific term disbursement details when requesting to move disbursed amounts from the External Award staging tables to the Awarding tables using the 'Append' reporting code.

Chapter 32

Managing Repackaging

This chapter provides an overview of repackaging and discusses how to:

- Run the Need Summary Validation process.
- Perform batch repackaging.
- Perform online repackaging.
- Review a repackaging result.

See Also

[Chapter 39, "Processing ACG and SMART Grants," page 1531](#)

Understanding Repackaging

Using repackaging, you can award financial aid for groups of students. An equation, a PS Query, or an external file can identify the group of students for repackaging. You can then associate one or more repackaging plans to that population. You can evaluate your selected population and the repackaging plan associated with each student first. The system selects the optimum repackaging plan for each student based on the combination of your repackaging equations and the processing order of the repackaging plan. Then the system applies the repackaging plan against those selected students, awarding each student based on the defined repackaging plan rules.

Three processes are run as part of repackaging. The first process selects students for evaluation. The second process assigns repackaging plans to students. The third process reviews the student's eligibility, the program rules, and other eligibility criteria and then decreases, increases, or validates existing awards, or assigns new awards to students using the assigned repackaging plans. After the first two processes, you can review the students being selected and the assigned repackaging plans. You can also review the order in which the students are repackaged, again by repackaging plan. You can delete students who should not be repackaged. Finally, you can run the third process in live mode or in simulation mode to review expected repackaging results.

Before repackaging, consider the results that you want the system to produce according to your institution's repackaging philosophies. Determine the student attributes to use in the repackaging equations to select the correct students for each repackaging plan. Review the criteria that each repackaging plan uses to select students. If some of the selected students cannot be matched to any of your repackaging plans, review the list of these students to determine why they did not get matched. Adjust your equations to ensure that these students are assigned correctly.

Unlike Packaging, during Repackaging locked awards are always preserved and unchanged, even if the student is in an overaward situation.

During the loading of external awards, an EA lock attribute is set, such that external awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. When the EA lock is set, you cannot remove it.

Note. Your repackaging plans must be established before you begin repackaging; if you change the selection criteria in either Equations or PS Query, rerun the Batch Repackaging Selection routine. If you make changes to your repackaging plans, rerun the Assign Repackaging plans routine before running the Batch Repackaging process. Changing any repackaging plan selection criteria (tied at the plan level) after students have been assigned to repackaging plans may produce incorrect or undesirable results.

You should run Need Summary Validation before performing any Repackaging activities.

See Also

[Chapter 9, "Setting Up Repackaging," Setting Up a Repackaging Plan, page 270](#)

[Chapter 28, "Awarding and Packaging Students," Need Summary Validation, page 988](#)

[Chapter 31, "Managing External Award Reporting," Loading Data to the Student Award Table, page 1085](#)

Running the Need Summary Validation Process

This section discusses how to select students for Need Summary Validation.

Page Used to Run the Need Summary Validation Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Students for Need Summary Validation	SFA_RUN_NEEDUPD	Financial Aid, Awards, Need Summary Validation, Select Students for Need Summary Validation	Update the needs summary to reflect changes made to Cost of Attendance (COA) or Effective Family Contribution (EFC).

Selecting Students for Need Summary Validation

Access the Select Students for Need Summary Validation page (Financial Aid, Awards, Need Summary Validation, Select Students for Need Summary Validation).

Select Students for Need Summary Validation	
Run Control ID:	PS
Report Manager Process Monitor Run	
Population Selection	
Selection Tool	PS Query
Query Name	QA_CS_FA_NEEDUPDT
Launch Query Manager Preview Selection Results	
Parameters	
*Institution	PSUNV PeopleSoft University
*Aid Year	2007 Financial Aid Year 2006 - 2007

Select Students for Need Summary Validation page

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Selection Tool Select one of these values: *Equation Engine*, *PS Query*, or *External File*. Additional parameters appear for your selected tool.

Query Name For PS Query, select a population selection query that joins with the bind record SFA_BNSV_BIND, which does not require a career.

Performing Batch Repackaging

This section discusses how to:

- Select students for repackaging.
- Review students selected for batch repackaging.
- Assign repackaging plans to selected students.
- Review repackaging plans assigned by query.
- Review repackaging plans by students.
- Repackage groups of students.
- Review batch repackaging summary.

- Review eligibility and need after repackaging.
- Review batch repackaging details.
- Review batch repackaging errors.

Pages Used to Perform Batch Repackaging

Page Name	Definition Name	Navigation	Usage
Select Students for Repackaging	SFA_RUN_RPKG_SEL	Financial Aid, Awards, Repackaging, Select Students to Repackage, Select Students for Repackaging	Define the population of students to repackage for award eligibility.
Batch Repackaging Students	SFA_RPKG_STDNTLIST	Financial Aid, Awards, Repackaging, View Selected Students, Batch Repackaging Students	View a list of students selected for repackaging. Optionally, select <i>Valid</i> or <i>Invalid</i> for Process Status.
Assign Repackaging Plan	SFA_RUN_RPKG_ASN	Financial Aid, Awards, Repackaging, Assign Repackaging Plans, Assign Repackaging Plan	For a selected population, assign one or more repackaging plans.
Batch Repackaging Plans Assigned	SFA_RPKG_PLAN_INQ	Financial Aid, Awards, Repackaging, View Assigned Plans, Batch Repackaging Plans Assigned	View all the students assigned to each repackaging plan.
Batch Repackaging Students by Plan	SFA_RPKG_STDNTPLAN	Financial Aid, Awards, Repackaging, View Students by Plan, Batch Repackaging Students by Plan	View individual students and the repackaging plan assigned to each, sorted by specified sort field.
Repackage Students in Batch	SFA_RUN_RPKG	Financial Aid, Awards, Repackaging, Process Batch Repackaging, Repackage Students in Batch	Repackage a select group of students using their assigned repackaging plans.
Batch Repackaging Summary	SFA_BRPKG_SUMM	Financial Aid, Awards, Repackaging, View Batch Repackaging Summary, Batch Repackaging Summary	Display all repackaging plans, number of students selected, number repackaged, and number not repackaged.
Eligibility and Need	SFA_BRPKG_STUDTL	Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Eligibility and Need	View eligibility and need details for a student after repackaging.

Page Name	Definition Name	Navigation	Usage
Award Detail	SFA_BRPKG_AWDDTL	Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Award Detail	View award details for a student after repackaging.
Batch Repackaging Errors	SFA_BRPKG_ERROR	Financial Aid, Awards, Repackaging, View Batch Repackaging Errors, Batch Repackaging Errors	View message number and error detail for each student for whom repackaging failed.

Selecting Students for Repackaging

Access the Select Students for Repackaging page (Financial Aid, Awards, Repackaging, Select Students to Repackage, Select Students for Repackaging).

Select Students for Repackaging

Run Control ID: RPKG_DECINCORIG [Report Manager](#) [Process Monitor](#) Run

Population Selection

☐ Population Selection

Processing Status Selection

Aid Processing Status Repackage

Parameters

*Institution PSUNV PeopleSoft University

*Aid Year 2007 Financial Aid Year 2006 - 2007

Select Students for Repackaging page

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Select the Population Selection check box.

Population Selection

☒ Population Selection

Selection Tool

PS Query

Query Name

QA_CS_FA_RPKG_DECINCORIG

[Launch Query Manager](#)

[Preview Selection Results](#)

Select Students for Repackaging: Population Selection check box

- Population Selection

Select to use Population Selection to define the student population.
- Selection Tool

Appears if Population Selection check box is selected. Select from *Equation Engine*, *PS Query*, or *External File*. Additional parameters are displayed for your selected tool.
- Query Name

Appears only when PS Query is selected. Select a PS Query that selects a population using one of these bind records
 - SFA_BRPKGX_BIND, if population selection is not based on career
 - SFA_BRPKG_BIND, if population selection is based on career
- Equation Name

If you select *Equation Engine*, the Equation Name field appears. Select an equation that is defined with the application prompt Batch Repackaging Selection.

Processing Status Selection

If the Population Selection check box is not selected, the Processing Status Selection appears.

- Aid Processing Status

Select *Repackage* or any status that indicates that the student has been previously packaged and needs to be reevaluated. The External Award Load process assigns the *Repackage* status to any student who has a Loan Certification Request as an external award or if the student's Aid Processing status is *Complete*.

Reviewing Students Selected for Batch Repackaging




Access the Batch Repackaging Students page (Financial Aid, Awards, Repackaging, View Selected Students, Batch Repackaging Students).

Batch Repackaging Students

Academic Institution: PSUNV PeopleSoft University

Aid Year: 2007 Financial Aid Year 2006 - 2007

Selection Definition: QUERY: QA_CS_FA_RPKG_DECINCORIG

Customize Find View All 				First 	1-27 of 27 	Last
ID	Name	Career	Description	Process Status		
FARPK0004	Foneghue,Matt G	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0005	Morehouse,Joshua F	GRAD	Graduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0005	Morehouse,Joshua F	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0007	Parker,Cindy L	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0008	Sneider,Andrew P	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0009	Morrelly,Anna H	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0011	Morrison,Angel P	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0012	Melayon,Arthur A	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0019	Pastamani,Bessie V	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0020	Quigley,Bonnie E	GRAD	Graduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0031	Coriander,Demi B	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0045	Quijano,Patrick P	GRAD	Graduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0045	Quijano,Patrick P	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0046	Dellamante,Nikko O	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0047	Corcoran,Jessica I	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>
FARPK0052	Zachariah,Paul W	UGRD	Undergraduate	<div>Valid</div>	<div></div>	<div>-</div>

Batch Repackaging Students page

Process Status Indicates whether the student is processed (*Valid*) or not processed (*Invalid*) in the next Repackaging run.

You can delete the student's row or change the Process status to *Invalid* to remove a student from this repackaging batch. If students have multiple careers, a row exists for each career for which they can be repackaged.

Assigning Repackaging Plans to Selected Students

Access the Assign Repackaging Plan page (Financial Aid, Awards, Repackaging, Assign Repackaging Plans, Assign Repackaging Plan).

Assign Repackaging Plan

Run Control ID: RPKG_DECINCORIG [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

Institution PeopleSoft University

Aid Year Financial Aid Year 2006 - 2007

Selection Definition

Repackaging Plan Parameters Customize | Find |

First 1-19 of 19 Last

	Career	Repackaging Plan	Sort Field	Sort Order		
1	GRAD	DECTSEXCYS	FED_EFC	Ascending		
2	GRAD	DECTYPESRC	FED_EFC	Ascending		
3	GRAD	INCR_TOP	FED_EFC	Ascending		
4	GRAD	INC_RIT	FED_EFC	Ascending		
5	UGRD	DECBOTTMUF	FED_EFC	Ascending		
6	UGRD	DECBTEXCN	FED_EFC	Ascending		
7	UGRD	DECBTEXCYS	FED_EFC	Ascending		
8	UGRD	DECITEXCNO	FED_EFC	Ascending		
9	UGRD	DECITEXCYS	FED_EFC	Ascending		
10	UGRD	INCAFTERIT	FED_EFC	Ascending		
11	UGRD	INCAFTERNB	FED_EFC	Ascending		
12	UGRD	INCREASEIT	FED_EFC	Ascending		
13	UGRD	INCR_NEGSI	FED_EFC	Ascending		
14	UGRD	INC_BEFORE	FED_EFC	Ascending		
15	UGRD	INC_BOTTOM	FED_EFC	Ascending		
16	UGRD	INC_IT_EA	FED_EFC	Ascending		

Assign Repackaging Plan page

From the Selection Definition list, select the name of the student group defined on the Select Students for Repackaging page. Then define the repackaging plan for this group of students.

Repackaging Plan Parameters

Career Select the academic career to process during this Repackaging run.

Repackaging Plan Select from the list of repackaging plans for this aid year and career.

Sort Field

Select a field on which to sort students within each plan. Then select ascending or descending order from the Sort Order field. Sort field and sort order determine the order in which students are repackaged. For example, to repackage students with the lowest Federal EFC first and students with the highest Federal EFC last, select *FED_EFC* and then a sort order of *Ascending*.

Select from:

- *ADJ_PAR_CONTRIB* (Adjusted Parent Contribution)
- *AGI_PAR* (Parents' Adjusted Gross Income)
- *AGI_STU* (Students' Adjusted Gross Income)
- *EMPLID* (Employee ID)
- *FED_EFC* (Federal Effective Family Contribution)
- *FED_NEED* (Federal Need)
- *FED_PARENT_CONTRB* (Federal Parent Contribution)
- *FED_STDNT_CONTRB* (Federal Student Contribution)
- *INST_EFC* (Institutional Effective Family Contribution)
- *INST_PARENT_CONTRB* (Institutional Parent Contribution)
- *INST_STDNT_CONTRB* (Institutional Student Contribution)
- *PRORATED_EFC* (Prorated Effective Family Contribution)
- *TRANS_PROCESS_DT* (Transaction Process Date)

Note. Do not use *FED_EFC* for repackaging plans that have a non-standard award period. *FED_EFC* represents the *PRIMARY_EFC*, which is the 9-month EFC that is synonymous with the academic award period. Therefore, all non-standard award period *FED_EFC* values equal 0.00. If you sort by *FED_EFC* for non-standard plans, the system defaults the sort order to *EMPLID*.

Sort Order

Based on the selected sort field, select *Ascending* to order students from lowest to highest or *Descending* to order students from highest to lowest. See Sort Field.

Reviewing Repackaging Plans Assigned by Query

Access the Batch Repackaging Plans Assigned page (Financial Aid, Awards, Repackaging, View Assigned Plans, Batch Repackaging Plans Assigned).

Batch Repackaging Plans Assigned

Academic Institution PSUNV PeopleSoft University
Aid Year 2007 Financial Aid Year 2006 - 2007
Selection Definition QUERY: QA_CS_FA_RPKG_DECINCORIG

Find View 1 First 1-17 of 17 Last			
Pkg Plan Selection Criteria Not Met			Career GRAD
Customize Find First 1 of 1 Last			
*EmpID	Name	FED_EFC	
FARPK0045	Quijano,Patrick P		-
Repackaging Plan ID DECTSEXCYSRPKG: Decrease TS Exclude=YES			Career GRAD
Sort Field FED_EFC	Sort Order Asc	Plan Order 105	
Customize Find First 1 of 1 Last			
*EmpID	Name	FED_EFC	
FARPK0055	Bleckman,David G	13,830.00	-
Repackaging Plan ID DECTYPESRCRPKG: Decrease by Type/Source			Career GRAD
Sort Field FED_EFC	Sort Order Asc	Plan Order 106	
Customize Find First 1 of 1 Last			
*EmpID	Name	FED_EFC	
FARPK0020	Quigley,Bonnie E	18.00	-
Repackaging Plan ID INCR_TOP RPKG: Insert at TOP of PKG			Career GRAD
Sort Field FED_EFC	Sort Order Asc	Plan Order 115	
Customize Find First 1 of 1 Last			
*EmpID	Name	FED_EFC	
FARPK0200	Saito,Jim F	68.00	-

Batch Repackaging Plans Assigned page

To further identify each repackaging plan, the page lists the student's career, the sort field and order from the Assign Repackaging Plan page, and the plan order from the repackaging plan setup.

In this example, Patrick Quijano (FARPK0045) did not meet any of the selection criteria of the repackaging plans defined on the Assign Repackaging Plans page. The batch routine did not assign him a repackaging plan.

The Sort Field field displays the value of the FED_EFC sort field, which was defined on the Assign Repackaging Plans page.

Reviewing Repackaging Plans by Students

Access the Batch Repackaging Students by Plan page (Financial Aid, Awards, Repackaging, View Students by Plan, Batch Repackaging Students by Plan).

Batch Repackaging Students by Plan			
Academic Institution	PSUNV PeopleSoft University		
Aid Year	2007 Financial Aid Year 2006 - 2007		
Selection Definition	QUERY: QA_CS_FA_RPKG_DECINCORIG		
Repackaging Plan ID	DECTSEXCY5 RPKG: Decrease TS Exclude=YES	Career	GRAD
Sort Field	FED_EFC	Sort Order	Asc
		Plan Order	105
Customize Find View All First 1 of 1 Last			
*EmplID	Name	FED_EFC	
FARPK0055	Bleckman,David G	13,830.00	

Batch Repackaging Students by Plan page

For each repackaging plan, the page displays the repackaging plan ID, career, and sort field and sort order from Assign Repackaging Plan page. The plan order is the processing order for the repackaging plan from the repackaging plan setup.

For each repackaging plan, the selected students are listed as sorted by the sort field and sort order. In this example, the students are listed in ascending FED_EFC order, as defined on the Assign Repackaging Plans page. The Sort Field column, such as FED_EFC, lists the FED_EFC value.

Repackaging Groups of Students

Access the Repackage Students in Batch page (Financial Aid, Awards, Repackaging, Process Batch Repackaging, Repackage Students in Batch).

Repackage Students in Batch

Run Control ID: RPKG_DECINCORIG

[Report Manager](#) [Process Monitor](#)

Run

Report Request Parameters

*Institution	<div>PSUNV</div>	<div>PeopleSoft University</div>	<div><input type="radio"/> Live</div>
*Aid Year	<div>2007</div>	<div>Financial Aid Year 2006 - 2007</div>	<div><input checked="" type="radio"/> Simulation</div>
*Selection Definition	<div>QUERY: QA_CS_FA_RPKG_DECINCORIG</div>		

Repackage Students in Batch page

Selection Definition

From the Selection Definition list, select the name of the student group defined on the Select Students for Repackaging page.

Live

Select this mode to run the process and commit the awards to the database. This includes tables such as student awards, student disbursements, student aggregate history, loan information, fiscal item types, and the award activity log.

Note.

Oracle recommends that you run in Simulation mode at least once before running in Live mode.

Simulation

Select this mode to simulate and view results. You can then refine your repackaging plan rules and rerun Batch Repackaging Simulation to produce the desired award amounts. When you are satisfied with the Simulation results, rerun Batch Repackaging in Live mode.

Reviewing Batch Repackaging Summary

Access the Batch Repackaging Summary page (Financial Aid, Awards, Repackaging, View Batch Repackaging Summary, Batch Repackaging Summary).

Batch Repackaging Summary

Institution: PeopleSoft University

Aid Year: 2006-2007

Find First 1-3 of 3 Last

Batch Number: 10

Batch Date Time: 09/29/2006 12:59PM

Live vs. Simulation: Simulation

Student Batch Results

Customize | Find | First 1-5 of 5 Last

Academic Career	Repackaging Plan ID	Total Selected	Total Packaged	Total Not Packaged
Graduate	Validate Entire Package	1	1	0
Undergraduate	Decrease by Type and Source	1	1	0
Undergraduate	Increase by Item Type	1	1	0
Undergraduate	Original Packaging Plan	2	2	0
Undergraduate	Validate Item Type	1	1	0

Batch Number: 11

Batch Date Time: 09/29/2006 1:04PM

Live vs. Simulation: Simulation

Student Batch Results




Customize | Find | First 1-16 of 16 Last

Academic Career	Repackaging Plan ID	Total Selected	Total Packaged	Total Not Packaged
Graduate	RPKG: Decrease TS Exclude=YES	1	1	0
Graduate	RPKG: Decrease by Type/Source	1	1	0
Graduate	RPKG: Insert at TOP of PKG	1	1	0
Graduate	RPKG: Increase RIT	1		1
Undergraduate	RPKG: Decrease Bottom Up	3	3	0
Undergraduate	RPKG: Decrease BOT Exclude=NO	1	1	0

Batch Repackaging Summary page (1 of 2)

Undergraduate	RPKG: Decrease BOT Exclude=YES	1	1	0
Undergraduate	RPKG: Decrease IT Exclude=NO	1	1	0
Undergraduate	RPKG: Insert AFTER Item Type	1	1	0
Undergraduate	RPKG: Insert AFTER Need-Based	1	1	0
Undergraduate	RPKG: Increase Item Type	1	1	0
Undergraduate	RPKG: Insert BEFORE Item Type	1	1	0
Undergraduate	RPKG: Insert at BOTTOM of PKG	1	1	0
Undergraduate	RPKG: Increase IT for NON-STD	3	3	0
Undergraduate	RPKG: Increase RIT	2	2	0
Undergraduate	RPKG: Original Packaging Plan	6	6	0

Batch Number:	12	Batch Date Time:	09/29/2006 1:16PM	Live vs. Simulation:	Simulation
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Student Batch Results				
		Customize Find 	First  1-8 of 8  Last	
Academic Career	Repackaging Plan ID	Total Selected	Total Packaged	Total Not Packaged
Graduate	RPKG: Increase IT - EA	1	1	0
Graduate	RPKG: Validate Item Type	1	1	0
Graduate	RPKG: Validate LCR	1	1	0
Undergraduate	RPKG: Decrease Bottom Up	1	1	0
Undergraduate	RPKG: Increase IT - EA	3	3	0
Undergraduate	RPKG: Validate Item Type	5	5	0
Undergraduate	RPKG: Validate Entire Package	6	6	0
Undergraduate	RPKG: Validate LCR	1	1	0

Batch Repackaging Summary page (2 of 2)

Batch Number	The number that is assigned to the batch of students when you run the Repackaging process.
Batch Date Time	The date and time that you ran the Repackaging process for this batch of students.
Live vs. Simulation	Indicates whether you ran the Repackaging process in live or simulation mode. Values are: <i>Live:</i> The Repackaging process updated all award-related tables. <i>Simulation:</i> You can review the results of the Repackaging process, but award-related tables were not updated.
Repackaging Plan ID	Identifies the repackaging plan used in this Repackaging process.
Total Selected	The total number of students assigned to this repackaging plan.

Total Packaged	The total number of students who were successfully repackaged using this repackaging plan.
Total Not Packaged	The total number of students who were assigned this repackaging plan but did not receive any awards because of one or more errors.

Reviewing Eligibility and Need After Repackaging

Access the Eligibility and Need page (Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Eligibility and Need).

Eligibility and Need		Award Detail	
Batch Number	11	Batch Date Time	09/29/2006 1:04PM
Total Packaged	1		
Institution	PeopleSoft University	Aid Year	2006-2007
Repackaging Plan	RPKG: Decrease BOT Exclude=NO	Career	Undergraduate

Eligibility Summary				Find	View All	First	1 of 1	Last
Sequence	1	ID	FARPK0056	Name	Brionder,Lauren J			
Federal Dependency Status	Dependent			Institutional Dependency Status				
Federal PELL Eligibility	Yes			Received First Bachelor Degree	No			
Title IV Eligibility								

Need Summary by Award Period				Find	First	1 of 2	Last
Award Period	Academic		EFC Status	Official			
Fed Year COA	12,700.00		Inst Year COA	12,700.00			
Prorated EFC	560		Institutional EFC	0			
Fed Need	12,140.00		Inst Need	12,700.00			
Montgomery GI Bill/AmeriCorps	0		Montgomery GI Bill/AmeriCorps	0			
N/B Aid (Fed)	12,140.00		N/B Aid (Inst)	8,780.00			
Special Need/Cost Aid (Fed)	200.00		Special Need/Cost Aid (Inst)	0.00			
Total Aid (Fed)	12,340.00		Total Aid (Inst)	8,780.00			
Unmet Need (Fed)	0.00		Unmet Need (Inst)	3,920.00			
Unmet COA(Fed)	360.00		Unmet COA(Inst)	3,920.00			
Pell Year COA	12,700.00	Alt Pell COA	2,700.00	Pell LTHT	4,300.00		

Eligibility and Need page

This information is for a single repackaging plan. To view other students, use the Eligibility Summary scroll arrows. To view further information for this student, use the Need Summary by Award Period scroll arrows.

Eligibility Summary

Sequence	Indicates the order in which students were repackaged during the Repackaging process.
Federal Dependency Status	Indicates whether the student is dependent or independent under federal methodology.
Institutional Dependency Status (institutional dependency status)	Indicates whether the student is dependent or independent under institutional methodology.
Federal PELL Eligibility	Indicates whether the student is eligible to receive a Pell Grant.
Received First Bachelor Degree	Indicates whether the student has already received his or her first bachelor's degree.
Title IV Eligibility	Indicates whether the student is eligible to receive federal Title IV aid.

Reviewing Batch Repackaging Details

Access the Award Detail page (Financial Aid, Awards, Repackaging, View Batch Repackaging Details, Award Detail).

Eligibility and Need

Award Detail

Batch Number11Batch Date Time09/29/2006 1:04PMTotal Packaged1

InstitutionPeopleSoft UniversityAid Year2006-2007

Repackaging PlanRPKG: Decrease BOT Exclude=NOCareerUndergraduate

Find | View AllFirst1 of 1Last

Seq1IDFARPK0056NameBrionder,Lauren J

Customize | Find | First1-8 of 8Last

Nbr	Item Type	Description	Disb Plan	Split Code	Offered		Message
10	900000000100	Federal Pell Grant	RP	XX	3,500.00	Disbursement	
20	900000000702	State Scholarship - Actual	RP	01	2,000.00	Disbursement	
30	900000000006	Honors Scholarship	RP	01	5,280.00	Disbursement	
40	900000000120	University Grant	RP	01	0.00	Disbursement	Message
50	900000000105	Federal SEOG Grant	RP	01	0.00	Disbursement	Message
60	900000000040	FASS: Grant	RP	01	1,000.00	Disbursement	
70	900000000041	FASS: Scholarship	RP	01	560.00	Disbursement	
80	900000000704	Exclude Grant	RP	01	0.00	Disbursement	Message

Award Detail page

All awards in the repackaging plan are listed as zero or nonzero awards. Nonzero awards display a link to the scheduled disbursements.

Seq (student sequence)	Indicates the order in which students were repackaged during the Repackaging process.
Nbr (award number)	The sequence number is automatically assigned in increments of ten when awards are entered.
Item Type	The financial aid item type of the student's award.
Disb Plan (disbursement plan)	The disbursement plan that is assigned to the student's award.
Split Code	The split code of the student's award, which indicates how the award is split for disbursement to the student.
Offered	If the offered amount for an award is 0.00, then the student was not eligible for that particular award or it was an unlocked, pre-existing award. The zero awards are not visible after the student's award package is posted.
Disbursement	Click to access the Batch Repackaging Disbursement page and view scheduled disbursement detail for an award.
Message	Click to access the Batch Repackaging Message page and view the reason that the student did not receive this award.

Reviewing Batch Repackaging Errors

Access the Batch Repackaging Errors page (Financial Aid, Awards, Repackaging, View Batch Repackaging Errors, Batch Repackaging Errors).

Batch Repackaging Errors			
Batch #:	11	Batch Date Time:	09/29/2006 1:04PM
Total Not Packaged:	1		
Institution:	PSUNV PeopleSoft University	Aid Year:	2006-2007
Repackaging Plan ID:	RPKG: Increase RIT	Career:	GRAD
Customize Find First 1 of 1 Last			
Error Sequence	ID	Name	Message Number
1	FARPK0005	Morehouse, Joshua F	9590

Batch Repackaging Errors page

Only students who had serious errors, such as students who had their financial aid term deleted, are in this list.

Batch #	The batch number identifies the particular Repackaging session.
Batch Date Time	The date and time that the Repackaging session was run.
Total Not Packaged	The total number of students who were assigned to the repackaging plan but were not repackaged due to an error.
Error Sequence	The key by which the error data is sorted.
ID	The ID of the student who was not repackaged.
Message Number	Click to view the error message.

Repackaging Error Messages

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation</i>
9221	Repackaged award does not exist; Item Type rejected.	This item type was entered into the Packaging process during repackaging and is marked as a change or cancel. However, the item type does not exist at this stage in the student's current package. As a result, it is being discarded.
9223	Repackaging: Item Type award amount has been decreased.	This item type is being processed in Repackaging for a decrease, and has either been decreased to a lower award amount or set to a 0.00 value and canceled.
9224	Repackaging: Item Type Increase does not meet increase threshold; rejected.	This item type is being processed in Repackaging for an increase, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9225	Item Type with disbursements canceled.	This disbursed award has been canceled. The item type does not meet disbursement protection rules.
9226	Item Type decrease does not meet decrease threshold; rejected.	This item type is being processed in Repackaging for a decrease, but the need or cost of attendance threshold for the package has not been met. As a result, the item type is rejected.
9506	This student was not assigned to a Packaging, or Repackaging, Plan.	The student did not meet the selection criteria for the packaging or repackaging plans defined for the specified career.
9528	Award was auto-canceled.	The award was canceled by an Auto Cancel item type.
9544	Invalid equation data for Selection Criteria at the Packaging, or Repackaging, Plan level.	Incorrect or inconsistent equation data is associated with the selection criteria at the packaging or repackaging plan level.

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation</i>
9590	Student has no awards for the specified academic career.	The student cannot be repackaged because no awards exist for the specified academic career.
9591	Student does not have a Packaging Plan.	The Repackaging rule is Original Packaging Plan, but the packaging plan ID is missing from STDNT_AID_ATRBT. Please contact your system administrator for assistance.
9592	Number of Auto-cancel Item Types exceeds the size of an internal table.	The total number of auto-cancel item types exceeds the size of an internal table. Please contact your system administrator for assistance.
9593	Unable to sequence new award as desired.	The system was unable to assign a PKG_SEQ_NBR that would sequence the new award as desired. Please contact your system administrator for assistance.
9594	No awarding from Related Item Type Group.	The system was unable to award any of the item types specified for a related item type group.

Performing Online Repackaging

You should run Need Summary Validation before performing any Repackaging activities.

This section discusses how to repackage an individual student.

See Also

[Chapter 28, "Awarding and Packaging Students," page 983](#)

Pages Used to Perform Online Repackaging

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Aid Package	STDNT_AWARD_ENTRY3	Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package	Use this page for manual repackaging, auto select repackaging, or auto repackaging. Auto select repackaging and auto repackaging can be combined with manual repackaging in the same online repackaging session.

Page Name	Definition Name	Navigation	Usage
Professional Judgement	STDNT_AWARD_ENTRY4	Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement	Use professional judgement to override all federal and aggregate rules except for fiscal limits when repackaging online. Repackage students without a budget. All item types awarded from this component are set to PJ locked.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	View the repackaging plan ID for a student who has been repackaged.

Repackaging an Individual Student

Access the Student Aid Package page (Financial Aid, Awards, Award Processing, Assign Awards to a Student, Student Aid Package) or the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement).

Student Aid Package
Need Summary
Term Summary

McChristy,Thomas A
ID: FA0602

Aid Year: 2007 Financial Aid Year 2006 - 2007
Institution: PSUNV

Career: UGRD Undergrad
Packaging Plan ID: P_EFC_UPPR Retrieve
Repackaging Plan ID: Repackage

Package Status: Applied
Aggregate Source: Default
Award Period: Both

Award Notification
Validate
Post
Reset

Award
Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code			
10	X	UGRD	9000000000702	State Scholarship - Actual	0.00	0.00	RP	01	Disbursement	Message	+
20	X	UGRD	9000000000120	University Grant	0.00	0.00	RP	01	Disbursement	Message	+
30		UGRD	9000000000041	FASS: Scholarship	1,000.00	1,000.00	RP	01	Disbursement		+
40	X	UGRD	9000000000043	FASS: Stipend	0.00	0.00	RP	01	Disbursement	Message	+
50	X	UGRD	9000000000200	Federal Work-Study Program	0.00	0.00	RP	01	Disbursement	Message	+
60	X	UGRD	9000000000322	Perkins Loan - ELO	0.00	0.00	RP	01	Disbursement	Message	+
70	X	UGRD	9000000000304	Sub Staff - Sem	0.00	0.00	RP	01	Disbursement	Message	+
80	X	UGRD	9000000000305	Unsub Staff Sem	0.00	0.00	RP	01	Disbursement	Message	+
90	X	UGRD	9000000000303	PLUS Loan	0.00	0.00	RP	01	Disbursement	Message	+

Student Aid Package page

Common Page Information

Career	<p>The active career for the student to be used for repackaging at this time. If the student has only one career, it is entered into the field by default. If the student has multiple careers, choose from among the active careers for the student, which are defined on the Financial Aid Term record.</p> <p>After you select a career, do not change this field until after you click the Post button or the Reset button. This prevents you from changing awards for more than one career at a time.</p> <p>Only the repackaging plans and disbursement plans associated with the active career are available during this session.</p> <hr/> <p>Note. If the student has only one career for the aid year, that career is entered into the Career field by default and you do not need to select a career.</p> <hr/>
Repackaging Plan ID	<p>Either select the repackaging plan from the list to use Auto Repackaging or leave the Repackaging Plan ID field blank to use Auto-Select Repackaging. For Auto-Select Repackaging, the system selects the repackaging plan that has the lowest sequence number of the plans for which the student qualifies and populates the Repackaging Plan ID field.</p>
Repackage	<p>Click this button and the system returns award results and the corresponding disbursement plan and split code data. After you post the repackaging results, the repackaging plan ID is displayed on the Student Aid Package, Professional Judgement, and Packaging Status Summary pages.</p>
Award Period	<p>Provides the Repackaging routine with the intended award period processing mode for the award period that you are currently repackaging. The routine uses this information to determine automatically which existing awards are active or passive. The award period that you select functions like the repackaging plan award period attribute in the Repackaging Plan setup in the determination of passive or active mode for existing awards. Values are:</p> <p><i>Both:</i> You are currently repackaging the student for both award periods. This is the default value. The Repackaging routine reevaluates all existing awards, processing all awards as active awards. When you select <i>Both</i>, all awards are available for reevaluation.</p> <p><i>Academic:</i> You are currently repackaging the student for the academic award period (AAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the AAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards.</p> <p><i>Non-Std</i> (nonstandard): You are currently repackaging the student for the non-standard award period (NSAP) only. The Repackaging routine reevaluates only existing awards whose disbursement plan/split code patterns indicate that they are for the NSAP or for both award periods. The Repackaging routine processes all other existing awards as passive awards.</p>
Reset	<p>Click to clear this instance.</p>

Post Click to save the results to the student award table.

Status tab

Select the Status tab.

Award		Status									
*Nbr	Action	Career	Item Type	PJ	EA	Lock	Need	Override	Charge	Priority	Award Status
10	X	UGRD	900000000702	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		Accepted
20	X	UGRD	900000000120	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
30		UGRD	900000000041	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
40	X	UGRD	900000000043	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
50	X	UGRD	900000000200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
60	X	UGRD	900000000322	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
70	X	UGRD	900000000304	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
80	X	UGRD	900000000305	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		
90	X	UGRD	900000000303	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL		

Student Aid Package page: Status tab

Lock Unlike Packaging, during Repackaging locked awards are always preserved and unchanged. Even if the student is in an overaward situation, Repackaging always retains the locked award in its entirety.

EA (external award) During the loading of external awards, this EA lock attribute is set. External awards are treated as locked awards during Repackaging. External awards are always preserved and unchanged, even if the student is in an overaward situation. You cannot remove the EA lock.

Review a Repackaging Result

This section discusses:

- Repackaging process behavior.
- Example of a decrease repackaging plan.

Repackaging Process Behavior

During the Repackaging process, the system updates the Unmet/Overaward Need and Unmet/Overaward COA totals as each award is adjusted. The system does not wait until all awards have been adjusted to calculate these Need Summary totals. The resulting Unmet/Overaward Need and Unmet/Overaward COA values determine whether further reductions or adjustments are necessary.

For the Decrease – Bottom Up Repackaging rule, the system reduces the student's package from bottom up (highest to lowest sequence), but calculates the Need Summary from top down (lowest to highest sequence). If the student's package contains Special Need/Cost awards and the Repackaging Plan is Decrease – Bottom Up, because the system updates the Need Summary totals top down after each award has been reduced, the characteristics of that Special Need/Cost award can change from completely replacing EFC to partially replacing EFC to completely reducing Unmet Need.

Example of a Decrease Repackaging Plan

The Decrease Repackaging Plan example focuses on the FASS Scholarship, a Special Need/Cost award, to highlight the changing nature of the Meet Need/Cost attribute. This behavior is similar to a Stafford Unsub. With each step in the Repackaging example, the FASS Scholarship amount progresses from completely replacing EFC to completely reducing Unmet Need.

Initially, the student was awarded 740 USD FASS Scholarship. During Repackaging, because the student's EFC is reduced to 560 USD and because this is a Special Need/Cost award, Repackaging reduces the award to match the EFC: The original award of 740 less EFC of 560 equals 180. Therefore, the system reduces the original award by 180.

Revised award = 560 ($740 - 180 = 560$).

When the system determines that the award is 560 USD, it preserves that award in the student's package. However, because that award is defined as Special/Need Cost, its attribute changes from completely replacing EFC to completely reducing Unmet Need.

Original Package Awards

The Student Aid Package page displays the student's initial set of awards.

Student Aid Package		Need Summary	Term Summary																																																																																										
Brionder, Lauren J		ID:	FARPK0056																																																																																										
Aid Year: 2007 Financial Aid Year 2006 - 2007		Institution:	PSUNV																																																																																										
Career:	UGRD Undergrad	Package Status:	Completed																																																																																										
Packaging Plan ID:	P_EFC_3850 Retrieve	Aggregate Source:	Default Validate																																																																																										
Repackaging Plan ID:	Repackage	Award Period:	Both Post Reset																																																																																										
<div>Award Status</div> <table border="1"> <thead> <tr> <th>*Nbr</th> <th>Action</th> <th>Career</th> <th>Item Type</th> <th>Description</th> <th>Offered</th> <th>Accepted</th> <th>Disb Plan</th> <th>*Split Code</th> <th></th> </tr> </thead> <tbody> <tr> <td>10</td> <td></td> <td>UGRD</td> <td>9000000000100</td> <td>Federal Pell Grant</td> <td>3,500.00</td> <td>3,500.00</td> <td>RP</td> <td>XX</td> <td>Disbursement +</td> </tr> <tr> <td>20</td> <td></td> <td>UGRD</td> <td>9000000000702</td> <td>State Scholarship - Actual</td> <td>2,000.00</td> <td>2,000.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>30</td> <td></td> <td>UGRD</td> <td>9000000000006</td> <td>Honors Scholarship</td> <td>6,000.00</td> <td>6,000.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>40</td> <td></td> <td>UGRD</td> <td>9000000000120</td> <td>University Grant</td> <td>3,900.00</td> <td>3,900.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>50</td> <td></td> <td>UGRD</td> <td>9000000000105</td> <td>Federal SEOG Grant</td> <td>4,000.00</td> <td>4,000.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>60</td> <td></td> <td>UGRD</td> <td>9000000000040</td> <td>FASS: Grant</td> <td>1,000.00</td> <td>1,000.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>70</td> <td></td> <td>UGRD</td> <td>9000000000041</td> <td>FASS: Scholarship</td> <td>740.00</td> <td>740.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> <tr> <td>80</td> <td></td> <td>UGRD</td> <td>9000000000704</td> <td>Exclude Grant</td> <td>1,000.00</td> <td>1,000.00</td> <td>RP</td> <td>01</td> <td>Disbursement +</td> </tr> </tbody> </table>				*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code		10		UGRD	9000000000100	Federal Pell Grant	3,500.00	3,500.00	RP	XX	Disbursement +	20		UGRD	9000000000702	State Scholarship - Actual	2,000.00	2,000.00	RP	01	Disbursement +	30		UGRD	9000000000006	Honors Scholarship	6,000.00	6,000.00	RP	01	Disbursement +	40		UGRD	9000000000120	University Grant	3,900.00	3,900.00	RP	01	Disbursement +	50		UGRD	9000000000105	Federal SEOG Grant	4,000.00	4,000.00	RP	01	Disbursement +	60		UGRD	9000000000040	FASS: Grant	1,000.00	1,000.00	RP	01	Disbursement +	70		UGRD	9000000000041	FASS: Scholarship	740.00	740.00	RP	01	Disbursement +	80		UGRD	9000000000704	Exclude Grant	1,000.00	1,000.00	RP	01	Disbursement +
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Original Package, Student Aid Package page

This table lists the relevant attributes for the original awards.

Sequence	Award	Meet Need/Cost	Lock
10	Federal Pell Grant	Straight Need/Cost	Unlocked
20	State Scholarship	Straight Need/Cost	Unlocked
30	Honors Scholarship	Special Need/Cost	Unlocked
40	University Grant	Straight Need/Cost	Unlocked
50	Federal SEOG Grant	Straight Need/Cost	Unlocked
60	FASS Grant	Straight Need/Cost	Locked
70	FASS Scholarship	Special Need/Cost	Unlocked
80	Exclude Grant	Straight Need/Cost	Locked

After the original package is made to the student, a change to COA or EFC occurs that forces the student into an overaward situation. As a result, the student is overawarded in both Need and COA.

Original Need Summary Totals

The Need Summary page displays the student's need summary totals after Packaging.

Student Aid Package		Need Summary		Term Summary	
Brionder, Lauren J				ID:	FARPK0056
Aid Year: 2007 Financial Aid Year 2006 - 2007				Institution:	PSUNV
Need Summary by Award Period				Find	First 1 of 2 Last
Award Period: Academic		EFC Status: Official			
Fed Year COA:	12,700.00	Inst Year COA:	12,700.00	Pell Year COA:	12,700.00
Prorated EFC:	560	Institutional EFC:	0	Alt Pell COA:	2,700.00
Fed Need:	12,140.00	Inst Need:	12,700.00	Pell LTHT:	4,300.00
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	21,400.00	N/B Aid (Inst):	17,400.00		
Special Need/Cost Aid (Fed):	740.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	22,140.00	Total Aid (Inst):	17,400.00		
Overaward (Fed):	10,000.00	Overaward (Inst):	4,700.00		
COA Overaward(Fed):	9,440.00	COA Overaward(Inst):	4,700.00		

Need summary totals after Packaging

The administrator determines that the student needs to be repackaged.

Decrease-Bottom Up Repackaging Plan

The Repackaging Plan page displays the Decrease – Bottom Up plan to be applied.

Repackaging Plan

Academic Institution:	PSUNV PeopleSoft University	Aid Year:	2007
Academic Career:	UGRD Undergraduate	Repackaging Plan ID:	DECBTEXCNO

Repackaging Target
Find First 1 of 1 Last

*Effective Date:	01/01/1900	*Status:	Active	*Processing Order:	108	Copy + -
*Description:	RPKG: Decrease BOT Exclude=NO		Short Description:	DECBTEXCNO		
*Award Period:	Both	Selection Criteria:	FAPDDCBTEXCN	Equation Detail		

FM Need Target:	<input type="radio"/> Constant	<input type="radio"/> Equation	<input checked="" type="radio"/> Percent	% Need FM:	100.0
IM Need Target:	<input type="radio"/> Constant	<input type="radio"/> Equation	<input checked="" type="radio"/> Percent	% Need IM:	100.0

Repackaging Rule
Find View 1 First 1-2 of 2 Last

Rule Nbr	1	Repackaging Rule	Decrease	Need Threshold	Federal overaward	Tolerance	
		Method	Bottom-up Reduction	<input type="checkbox"/> Reduce/Cancel disbursed amount			

Rule Nbr	2	Repackaging Rule	Decrease	Need Threshold	Federal overaward COA	Tolerance	
		Method	Bottom-up Reduction	<input type="checkbox"/> Reduce/Cancel disbursed amount			

Decrease — Bottom Up Repackaging plan

Step 1

The system first determines that the student is overawarded. It then locates the highest sequenced award, Exclude Grant, and evaluates it. Exclude Grant is a Straight Need/Cost award. Because it is a locked award, the system does not reduce it; it is preserved and remains unchanged. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA.

Item	Meet Need/Cost	Lock	Step 1		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,440.00)	740.00	(9,000.00)
Exclude Grant	Straight Need/Cost	Y	(9,440.00)	1,000.00	(10,000.00)
(Overaward Need)/ Unmet Need				(10,000.00)	(10,000.00)
(Overaward COA)/ Unmet COA			(9,440.00)	(9,440.00)	

Step 1 calculation

This the Need Summary result after the system processes the Exclude Grant.

Step 1	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	22,140.00
Special Need/Cost Aid	0.00
Total Aid	22,140.00
Overaward Need	(10,000.00)
Overaward COA	(9,440.00)

Result of step 1 calculation

The student is still overawarded.

Step 2

The next sequenced award, bottom up, is the FASS Scholarship. This is an unlocked Special Need/Cost award. Because the student is overawarded, the Special Need/Cost attribute is applied, and the system reduces the award down to match the EFC: The original award of 740 less EFC of 560 equals 180. Therefore, the system reduces the original award by 180.

Revised award = 560 (740 – 180 = 560).

After the reduction is made, the system then updates the Need Summary totals (top down). Both the COA and Need running totals are reduced based on existing awards as well as on the revised 560 USD FASS Scholarship. In this step, the FASS Scholarship completely replaces EFC.

Item	Meet Need/Cost	Lock	Step 2		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

Step 2 calculation

This the Need Summary result after the system processes the FASS Scholarship.

Step 2	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

Result of step 2 calculation

The student is still overawarded.

Step 3

The next sequenced award, bottom up, is the FASS Grant. This is a locked Straight Need/Cost award. Because it is locked, the system preserves the original amount and does not reduce it. The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA. In this step, the FASS Scholarship completely replaces EFC.

Item	Meet Need/Cost	Lock	Step 3		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(6,700.00)	4,000.00	(7,260.00)
FASS Grant	Straight Need/Cost	Y	(7,700.00)	1,000.00	(8,260.00)
FASS Scholarship	Special Need/Cost	N	(8,260.00)	560.00	(8,820.00)
Exclude Grant	Straight Need/Cost	Y	(9,260.00)	1,000.00	(9,820.00)
(Overaward Need)/ Unmet Need				(9,820.00)	(9,820.00)
(Overaward COA)/ Unmet COA			(9,260.00)	(9,260.00)	

Step 3 calculation

This is the Need Summary result after the system processes the FASS Grant.

Step 3	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	21,400.00
Special Need/Cost Aid	560.00
Total Aid	21,960.00
Overaward Need	(9,820.00)
Overaward COA	(9,260.00)

Result of step 3 calculation

The student is still overawarded.

Step 4

The next sequenced award, bottom up, is the SEOG, an unlocked, Straight Need/Cost award. Because the student still has an Overaward Need amount of 9,820 USD, the system reduces the SEOG award down to 0.00 USD. After the reduction is made, the system updates the Need Summary totals for the student, reducing both the Need and COA totals based on the revised SEOG as well as other existing awards. In this step, the FASS Scholarship completely replaces EFC.

Item	Meet Need/Cost	Lock	Step 4		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	(2,700.00)	3,900.00	(3,260.00)
SEOG	Straight Need/Cost	N	(2,700.00)	0.00	(3,260.00)
FASS Grant	Straight Need/Cost	Y	(3,700.00)	1,000.00	(4,260.00)
FASS Scholarship	Special Need/Cost	N	(4,260.00)	560.00	(4,820.00)
Exclude Grant	Straight Need/Cost	Y	(5,260.00)	1,000.00	(5,820.00)
(Overaward Need)/ Unmet Need				(5,820.00)	(5,820.00)
(Overaward COA)/ Unmet COA			(5,260.00)	(5,260.00)	

Step 4 calculation

This the Need Summary result after the system processes the SEOG.

Step 4	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	17,400.00
Special Need/Cost Aid	560.00
Total Aid	17,960.00
Overaward Need	(5,820.00)
Overaward COA	(5,260.00)

Result of step 4 calculation

The student is still overawarded.

Step 5

The next sequenced award, bottom up, is the University Grant, an unlocked, Straight Need/Cost award. Because the student's Overaward Need is 5,820 USD, the system reduces the University Grant to 0.00 USD.

The system then updates the Need Summary totals (top down) for Unmet/Overaward Need and Unmet/Overaward COA. After the University Grant reduction, the student is left with remaining Unmet Need and remaining Unmet COA.

The system then subtracts the 1,000 USD locked FASS Grant from the running Need Summary totals. With the handling of this award, it presents a condition in which an overaward exists for Need (–360) but not for COA (+200). Now, because the FASS Scholarship is a Special Need/Cost award, it tries to reduce Unmet Need. Because no Unmet Need exists, it then replaces EFC with 200 USD because Unmet COA is 200 USD. Note that the characteristics of the FASS Scholarship changes since the initial reduction of the FASS Scholarship took place at step 2.

Item	Meet Need/Cost	Lock	Step 5		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	1,200.00	6,000.00	640.00
University Grant	Straight Need/Cost	N	1,200.00	0.00	640.00
SEOG	Straight Need/Cost	N	1,200.00	0.00	640.00
FASS Grant	Straight Need/Cost	Y	200.00	1,000.00	(360.00)
FASS Scholarship	Special Need/Cost	N	(360.00)	560.00	(720.00)
Exclude Grant	Straight Need/Cost	Y	(1,360.00)	1,000.00	(1,720.00)
(Overaward Need)/ Unmet Need				(1,720.00)	(1,720.00)
(Overaward COA)/ Unmet COA			(1,360.00)	(1,360.00)	

Step 5 calculation

This is the Need Summary after the system processes the University Grant.

Step 5	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	13,860.00
Special Need/Cost Aid	200.00
Total Aid	14,060.00
Overaward Need	(1,720.00)
Overaward COA	(1,360.00)

Results of step 5 calculation

The student is still overawarded.

Step 6

The next sequenced award, bottom up, is the Honors Scholarship, an unlocked, Special Need/Cost award. The Overaward Need is 1,720 USD, but from a top down Need Summary perspective, the student has remaining Unmet Need. So the award inherits the Straight Need/Cost characteristic. To account for the Overaward Need of 1,720 USD, the system subtracts 1,720 USD from the original Honors Scholarship amount of 6,000 USD to reduce the award to 4,280 USD (original award 6,000 minus overaward 1,720 equals revised award 4,280).

After reducing the Honors Scholarship, from a Need Summary perspective (top down), the student has remaining Unmet Need of 2,360 USD. Progressing through the package and updating Need Summary, the system accounts for the 1,000 USD FASS Grant, reducing the student's Unmet Need to 1,360 USD. At this point, because the student has remaining Unmet Need and the FASS Scholarship amount of 560 USD is less than the Unmet Need amount of 1,360 USD, the Meet Need/Cost attribute of the FASS Scholarship now inherits the Straight Need/Cost characteristic. This reduces the student's Unmet Need to 800 USD.

Item	Meet Need/Cost	Lock	Step 6		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	2,920.00	4,280.00	2,360.00
University Grant	Straight Need/Cost	N	2,920.00	0.00	2,360.00
SEOG	Straight Need/Cost	N	2,920.00	0.00	2,360.00
FASS Grant	Straight Need/Cost	Y	1,920.00	1,000.00	1,360.00
FASS Scholarship	Special Need/Cost	N	1,360.00	560.00	800.00
Exclude Grant	Straight Need/Cost	Y	360.00	1,000.00	(200.00)
(Overaward Need)/ Unmet Need				(200.00)	(200.00)
(Overaward COA)/ Unmet COA			360.00	360.00	

Step 6 calculation

This is the Need Summary result after the system processes the Honors Scholarship.

Step 6	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,340.00
Special Need/Cost Aid	0.00
Total Aid	12,340.00
Overaward Need	(200.00)
Unmet COA	360.00

Results of step 6 calculation

The student is still overawarded in Need.

Step 7

Finally, because the student still has an Overaward Need amount of 200 USD and the Honors Scholarship amount is greater than 0.00 USD, the system reevaluates the Honors Scholarship a second time and reduces it by 200 USD so that the student is no longer in an overaward situation. At this point, when the Need Summary totals are updated, the FASS Scholarship still inherits the Straight Need/Cost characteristic.

Item	Meet Need/Cost	Lock	Step 7		
			Reduce COA	Original value	Reduce Need
COA			12,700.00	12,700.00	
EFC				560.00	
Need				12,140.00	12,140.00
Pell Grant	Straight Need/Cost	N	9,200.00	3,500.00	8,640.00
State Scholarship	Straight Need/Cost	N	7,200.00	2,000.00	6,640.00
Honors Scholarship	Special Need/Cost	N	3,120.00	4,080.00	2,560.00
University Grant	Straight Need/Cost	N	3,120.00	0.00	2,560.00
SEOG	Straight Need/Cost	N	3,120.00	0.00	2,560.00
FASS Grant	Straight Need/Cost	Y	2,120.00	1,000.00	1,560.00
FASS Scholarship	Special Need/Cost	N	1,560.00	560.00	560.00
Exclude Grant	Straight Need/Cost	Y	560.00	1,000.00	1,000.00
(Overaward Need)/ Unmet Need				0.00	0.00
(Overaward COA)/ Unmet COA			560.00	560.00	

Step 7 calculation

This is the Need Summary result after the system processes the Honors Scholarship a second time to eliminate the overaward.

Step 7	
COA	12,700.00
EFC	560.00
NEED	12,140.00
Need-based Aid	12,140.00
Special Need/Cost Aid	0.00
Total Aid	12,140.00
Unmet Need	0.00
Unmet COA	560.00

Results of step 7 calculation

The student is no longer in an overaward situation.

Final Award Results

The Student Aid Package page displays the final set of award results.

Student Aid Package		Need Summary		Term Summary						
Brionder, Lauren J			ID:		FARPK0056					
Aid Year: 2007 Financial Aid Year 2006 - 2007			Institution:		PSUNV					
Career:	UGRD	Undergrad	Package Status:	Repackage	Award Notification					
Packaging Plan ID:	P_EFC_3850	Retrieve	Aggregate Source:	Default	Validate					
Repackaging Plan ID:	DECBTEXCNO	Repackage	Award Period:	Both	Post Reset					
Award		Status								
*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code		
10	Action	UGRD	900000000100	Federal Pell Grant	3,500.00	3,500.00	RP	XX	Disbursement	+
20	Action	UGRD	900000000702	State Scholarship - Actual	2,000.00	2,000.00	RP	01	Disbursement	+
30	Action	UGRD	900000000006	Honors Scholarship	4,080.00	4,080.00	RP	01	Disbursement	Message +
40	Action	UGRD	900000000120	University Grant	0.00	0.00	RP	01	Disbursement	Message +
50	Action	UGRD	900000000105	Federal SEOG Grant	0.00	0.00	RP	01	Disbursement	Message +
60	Action	UGRD	900000000040	FASS: Grant	1,000.00	1,000.00	RP	01	Disbursement	+
70	Action	UGRD	900000000041	FASS: Scholarship	560.00	560.00	RP	01	Disbursement	Message +
80	Action	UGRD	900000000704	Exclude Grant	1,000.00	1,000.00	RP	01	Disbursement	+

Final results, Student Aid Package page

Final Need Summary Results

The Need Summary results page displays the final need totals.

Student Aid Package		Need Summary		Term Summary	
Brionder, Lauren J			ID:		FARPK0056
Aid Year: 2007 Financial Aid Year 2006 - 2007			Institution:		PSUNV
Need Summary by Award Period Find First 1 of 2 Last					
Award Period:		Academic		EFC Status: Official	
Fed Year COA:	12,700.00	Inst Year COA:	12,700.00	Pell Year COA:	12,700.00
Prorated EFC:	560	Institutional EFC:	0	Alt Pell COA:	2,700.00
Fed Need:	12,140.00	Inst Need:	12,700.00	Pell LTHT:	4,300.00
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	12,140.00	N/B Aid (Inst):	7,580.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	12,140.00	Total Aid (Inst):	7,580.00		
Unmet Need (Fed):	0.00	Unmet Need (Inst):	5,120.00		
Unmet COA(Fed):	560.00	Unmet COA(Inst):	5,120.00		

Final need totals, Need Summary page

At this point, an administrator might choose to repackage the student for an increase to fill the Unmet COA using a Special Need/Cost award.

Chapter 33

Managing Special Cases in Packaging

This chapter discusses how to:

- Manage special cases when packaging students.
- Award for multiple careers.
- Process awards for multiple award periods using passive/active mode.
- Use passive/active mode in Manual Packaging for multiple award periods.
- Award conditional aid for multiple award periods.
- Distribute awards when a shortage of need exists in one award period.
- Protect disbursements during awarding.
- Review one-term DL loan functionality.
- Manage origination from two-term loan to one-term loan.

Managing Special Cases When Packaging Students

This section provides an overview of awarding and packaging students and discusses how to:

- Award for additional terms.
- Award for nonstandard terms.
- Award without application data.
- Award for increased grade level eligibility.
- Add awards using the same financial aid item type.
- Re-award a cancelled or declined item type.
- Cancel awards with disbursements.
- Sequence loan awards.
- Process Direct Loan adjustments.
- Adjust CommonLine loan item types.

Understanding Awarding and Packaging Students

Financial Aid provides sophisticated tools to package students. You can manually award students one at a time, auto package students one at a time using a packaging plan, or Mass Package a large number of students using several packaging plans. Manual awarding and Auto Packaging are performed using one of the award entry components. Mass Packaging is performed using a series of background processes, but you can review the results of each step using inquiry and summary pages. After running Auto Packaging or Mass Packaging, you can supplement a student's package by manually entering awards. Using the award entry pages (Student Aid Package page, Manual Student Packaging page, and Professional Judgement page), you can also override default financial aid item types attributes, such as the disbursement plan and split code. Manual awarding is done by inserting as many financial aid item types as you want to complete a student's package or by modifying an existing award.

You must validate awards after manual award entry or after making any changes to existing awards. Validation is performed automatically as part of the Auto Packaging and Mass Packaging processes. Validation checks eligibility rules, fiscal limits, aggregate limits, and any other financial aid item type rules for each award. Validation lowers award amounts for awards that cause an over-award or which exceed fiscal or aggregate limits. When manually awarding Pell Grants, Validation assists you by calculating the Pell Grant eligibility amount for students when you leave the offer field at zero dollars.

Note. Before a student can be packaged, the U.S.E.D. database matches from the Central Processing System (CPS) must be passed. If one of the matches is returned with an ineligible code, it must be resolved before the student can be packaged for federal assistance. The procedure for resolving ineligible conditions is described in the documentation for the Database Matches page.

Awarding for Additional Terms

To award students for a term you must have a Financial Aid term and a budget associated with the student for the term that you want to award. If the Financial Aid term and budget do not exist for the term you are awarding, you must create a row in the Financial Aid term record and the budget record for that term. The Financial Aid term and a budget must be present for the student because the disbursement record for an award cannot be created without the associated Financial Aid term and budget. For example, if you want to award for a summer term before summer enrollment data—Financial Aid term—is available, you must manually create the summer Financial Aid term and a summer budget.

Note. A budget for the student is not required if you are awarding a financial aid item type that has a meet need/cost attribute of either *No Effect* or *Conditional* or if you are awarding using the Professional Judgement page.

If you are awarding for an additional term, not previously awarded for, you must use a relevant disbursement plan/split code combination to account for that new term. For example, if the student was awarded based on two terms, fall and winter, and now needs to be awarded for the spring term, you can change the split code if the disbursement plan encompasses all three terms. Otherwise, you must award for the spring term using different financial aid item types and disbursement plans and split codes that reflect a spring only disbursement.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Awarding and Rounding Rules, page 117

Awarding for Non-Standard Terms

The system supports awarding Pell Grants for non-standard award periods (NSAP) for Pell Grant Formulas 1 and 3. You can define a Summer term as the leading or trailing term. For Formula 1, the system divides the Pell Grant award by the Pell Number of Terms across both Academic and Non-Standard terms. For Formula 3, the system sums the Academic Base Weeks and Non-Standard Base Weeks to define the Academic Program's Weeks of Instruction for Pell Grant calculations..

See [Chapter 2, "Setting Up Your Financial Aid Awarding Cycle," Establishing Defaults, page 13.](#)

See [Chapter 27, "Preparing for Awarding and Packaging," Reviewing Pell Information, page 960.](#)

See [Chapter 29, "Awarding Pell Grants," Awarding Pell Grants for the 2010 and Future Aid Years, page 1035](#)

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Awarding Without Application Data

Students who have no application data (ISIR, PROFILE, Need Access, or institutional application) can be awarded. A student is considered to have no application if the student has no application data *or* if the student has an application that is different to that indicated in Packaging Data Source field on the Financial Aid Defaults page. For example, if you specify *Federal* for your packaging data source and the student only has a PROFILE application, the student is considered to have no application.

A student who has no application, as previously defined, is considered by Packaging to be ineligible for federal funds, except a PLUS loan. If you try to award federal funds (except a PLUS loan) to a student who has no application you get the message, *In NO APP status. Only conditional, No Effect, or PLUS Item Types are valid.* When a PLUS loan is being awarded to an undergraduate student who has no application, Packaging bypasses all federal eligibility checks, including the dependency check, and the PLUS loan is awarded.

Generally when awarding students who have no application, a budget is not required. However, students with no application who are awarded a PLUS loan must have a budget.

To award a financial aid item type to a student who has no application data—except for PLUS financial aid item types—the financial aid item type's Meet Need/Cost attribute must be defined as *Conditional*, *No Effect*, or *Cost Only* and the financial aid item type's Source attribute *cannot* be *Federal*. The Meet Need/Cost attribute must be *Conditional*, *No Effect* or *Cost Only* because no need is calculated for the student without an application. The Source attribute must not be *Federal*, except for PLUS, because when awarding a federal award, Packaging requires ISIR data.

See [Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112.](#)

If you are packaging a student who does not have an ISIR or institutional application data in the system, when you enter any of the award entry pages you receive a message that says, "Student does not have application data." This message is informational only; you can acknowledge the message and enter the page.

Awarding for Increased Grade Level Eligibility

Federally funded financial aid programs require strict eligibility requirements and borrowing limits. Most grade level limits increase as students progress in their studies. A student who has already borrowed up to the annual level limit within an academic year can receive additional funds if the annual level limit increases because a student advances or progresses to a new grade level with a higher-level limit. Financial Aid provides two procedural options to accommodate and award for an additional increase due to grade level changes. Option one is to use multiple and/or unique item types with different disbursement plans or split codes to support the additional eligibility. The other option is to select the Multi-Pass Processing check box. The Multi-Pass processing option set at the aggregate area level provides the means to automate mid-year grade level limit increases during the Awarding and Packaging process. This is an optional setting. This option is currently disabled for loan programs processed by the financial aid Loan Origination process (for example, Direct, FFELP, Health, Alternative and Perkins loan programs).

See [Chapter 5, "Setting Up Packaging Basics," page 75](#).

To award funds that have aggregate level limits defined and do not have the Multi-Pass processing option selected, you must use multiple financial aid item types and different disbursement plans/split codes to support the additional term. The financial aid item types must be associated with the same aggregate area to calculate aggregate limits correctly. The following scenario for the Stafford loan program demonstrates how it works.

Awarding Stafford loans across multiple NSLDS loan years is necessary when a student begins the financial aid year at one NSLDS level and then advances to the next level in subsequent terms within the same aid year. For example, you may have a student who is a freshman in the fall term but has enough credits to advance to a sophomore in the spring term. To determine the NSLDS loan year, Packaging evaluates the first nonzero disbursement record dictated by the disbursement plan/split code pattern and uses the corresponding term for that record. Then Packaging checks the student's NSLDS loan year for the corresponding term where the first nonzero disbursement record appears.

The student is awarded initially based on his or her freshman status—NSLDS loan year is Freshman. The student is awarded the maximum loan amount for a freshman—sequence #10. You select a disbursement plan/split code pattern for equal disbursements. You validate and post the award. The following table shows the initial loan award:

Seq	Item Type	Aggregate Area	Award Amount	Disb Plan	Disb Split	Disb Amount	Term/ NSLDS Level
10	900000001234	Subsidized Stafford	2625 USD	01	01 = 50% 50%	1313 USD 1312 USD	Fall/Freshman Spring/Freshman

Near the end of the fall term the student tells you that he or she has enough credits to be a sophomore for the spring term and would like to receive additional loan money. First, you must change the NSLDS loan year on the student's Financial Aid term record for the term in which the student advances to sophomore status. After changing the NSLDS loan year, rebuild the student's spring budget. Then the additional award amount must be entered as a separate financial aid item type on the award entry page—sequence #20. To do this, you must have two financial aid item types set up for the subsidized Stafford loan and two financial aid item types set up for the unsubsidized Stafford loan. Use one for the initial award and the other for any subsequent (add-on) awards.

You award a subsequent Stafford loan, using a different financial aid item type from the initial loan award and a different disbursement plan/split code pattern to support only the spring term. Packaging determines the award amount for the add-on loan. Use a disbursement plan/split code pattern that distributes 100 percent of the additional award in the spring term. If there were more than one term remaining in the aid year, you would distribute the 100 percent evenly across the remaining terms. If you are manually packaging the student, you can leave the award amount at zero, and the Validation process calculates the difference between the freshman loan maximum already awarded and the sophomore loan maximum and awards the correct amount (the difference). After validation, the two loans are both shown because they are two separate financial aid item types. The financial aid item types must be associated with the same aggregate area to account for all sources that affect aggregate limits eligibility. For all non-DL loan programs, you must provide disbursement plan and split code schemes that do not include any zero percentages in a disbursement ID. When a loan is originated, the scheduled disbursement amounts and associated disbursement ID is carried forward to the financial aid Loan Origination process. All non-DL loans with a zero amount associated with a disbursement ID are rejected during the initial Origination process. For example, a disbursement plan of three quarters (fall, winter and spring) could not be used to award a winter, and spring FFELP subsidized Stafford loan.

The first award is the total freshman loan amount split evenly across both terms and the second award—a different financial aid item type—represents the additional spring term only amount the student is eligible to receive as a sophomore. The following table shows the awards before and after validation:

Seq	Item Type	Aggregate Area	Award Amount	Disb Plan	Disb Split	Disb Amount	Term/NSLDS Level
10	900000001234	Subsidized Stafford	2625 USD	01	01 = 50% 50%	1313 USD 1312 USD	Fall/Freshman Spring/Freshman
20	900000005566	Subsidized Stafford	875 USD	03	01= 100%	875 USD	Spring/Sophomore

* Using the defined Aggregate limits, Packaging determines the student's eligibility to be 3500 USD (sophomore aggregate limit) minus 2625 USD (freshman award) equals 875 USD (maximum sophomore eligible limit).

Note. Using two financial aid item types causes Loan Origination to create a new master promissory note (MPN) for the second financial aid item type.

Adding Awards Using the Same Financial Aid Item Type

The system permits you to award additional awards using the same financial aid item type under the following conditions:

- NSLDS loan year must be the *same* for both awards using the same financial aid item type, only if the financial aid item type is tied to an aggregate area that does not have the Multi-Pass processing option selected.
- Career must be the *same* for both awards using the same financial aid item type.

- Disbursement plan must be the *same* for both awards using the same financial aid item type.
- Split codes can be *different* for the awards using the same financial aid item type.

Given the previous conditions, the Posting process collapses the two awards with the same financial aid item type into one award. The split codes are combined and a custom split code is returned. For example, if you have disbursement plan 01 and split code 02 for one award and disbursement plan 01 and split code 03 for the subsequent instance of that award, the combined award has disbursement plan 01 and split code XX.

When you are awarding for an add-on term, such as summer, you must follow the previous rules regarding NSLDS loan year.

If you have different careers with different NSLDS loan years, you can use the same financial aid item type because the financial aid item types for different careers are not combined.

Here is a list of the fields that are affected by the Award Merging process that occurs when the Posting process encounters two or more instances of the same financial aid item type:

<i>Field</i>	<i>Value After Item Types Are Merged</i>
Offered Amount	Sum of the offered amounts
Accepted Amount	Sum of the accepted amounts
Award Action	<p><i>B—Offered/Accepted</i> when sum of accepted Amounts > 0</p> <p><i>O—Offer</i> when previous condition is not met</p> <p>Note. Canceled and declined awards are no longer visible after posting.</p>
Split Code	<p>XX when different split codes are used</p> <p>Note. The disbursement plans must be the same.</p>
Aggregate Level	<p>When the Multi-Pass processing option is selected, the system tracks aggregate level limits based on each grade level limit increase.</p> <p>When the Multi-Pass processing option is not selected, the system tracks aggregate level limits based on the NSLDS Level from the term where the first nonzero disbursement ID exists within the disbursement plan.</p>

The following attributes are *not* affected by the Award Merging process that occurs when the Posting process encounters two or more instances of the same financial aid item type. The Posting process preserves the value of the highest sequence-numbered row for each of these attributes.

- Sequence Number
- Disbursement Plan

- Professional Judgement override
- Need Override
- Lock override
- Charge Priority List

Re-awarding a Canceled or Declined Item Type

In some instances you may want to re-award or repackage an award for a student after it has been canceled or declined. You can use the same financial aid item type as long as authorization, disbursement, or loan origination has not occurred. If the financial aid item type meets these conditions, you can reuse that financial aid item type regardless of disbursement plan/split code combinations. For a non-loan financial aid item type, authorization and disbursement amounts must be set to zero. If this financial aid item type is a loan and origination has *not* taken place, you can use the same financial aid item type. Otherwise, you must use a different financial aid item type. In addition, you can use the same or different sequence number when the conditions have been met. Using a different sequence number of a financial aid item type permits you to package the student in batch or online using the Auto Package function with the same financial aid item type after you have canceled the award.

For example, a student was awarded a non-loan financial aid item type such as a University Grant for 1,000.00 USD with a sequence number of 10 and a loan financial aid item type for 5,500.00 USD with a sequence number of 20. If the student originally declined both awards and later decided to attend spring term, you can use the same financial aid item types provided authorization, disbursement, or loan origination has not occurred. If the University Grant was disbursed for 500.00 USD for the fall term, you must set this disbursement down to zero—authorization and disbursement amounts must be backed out. You can then use the same financial aid item type and sequence number or insert a row and use a new sequence number for the same financial aid item type. If loan origination has not taken place, you can use the same financial aid item type and sequence number or insert a row. Otherwise, you must use a different financial aid item type and sequence number.

Canceling Awards with Disbursements

Packaging does not contain any edits to prevent you from canceling awards for which you have already made disbursements for a student. After you cancel a student's award that has associated disbursed amounts, Packaging retains a record of those disbursements—including the associated disbursement plan/split code pattern. This causes a problem if you attempt to award the student a second instance of the same financial aid item type for the award period but use a different disbursement plan than the disbursement plan associated with the canceled award. Packaging cannot reconcile the disbursement plan for the canceled award that has been partially or wholly disbursed with the disbursement plan called for by the new award. This situation can occur for financial aid item types whether or not disbursement protection has been activated for that financial aid item type.

For example, you offer an original award of the honors scholarship for 1,000.00 USD to a student. All amounts in the following table are in U.S. dollars (USD):

<i>FA Item Type</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Action</i>	<i>Award Amount</i>	<i>Disb Date</i>	<i>Scheduled Disbs.</i>	<i>Actual Disbs.</i>
Honors Scholarship	AT	09	A	1,000.00	Sep	500.00 (50%)	500.00
					Jan	500.00 (50%)	0.00

You then decide to cancel the original award, and offer the student a 900.00 USD honors scholarship with a different disbursement plan. The following table shows the retained canceled award and the new award. All amounts are in USD:

<i>FA Item Type</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Action</i>	<i>Award Amount</i>	<i>Disb Date</i>	<i>Scheduled Disbs.</i>	<i>Actual Disbs.</i>
Honors Scholarship	AT	09	C	0.00	Sep	0.00 (0%)	500.00
Honors Scholarship	01	01	A	900.00	Sep	100.00 (11.1%)	0.00
					Oct	100.00 (11.1%)	0.00
					Nov	100.00 (11.1%)	0.00
					Dec	100.00 (11.1%)	0.00
					Jan	100.00 (11.1%)	0.00
					Feb	100.00 (11.1%)	0.00
					Mar	100.00 (11.1%)	0.00
					Apr	100.00 (11.1%)	0.00

<i>FA Item Type</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Action</i>	<i>Award Amount</i>	<i>Disb Date</i>	<i>Scheduled Disbs.</i>	<i>Actual Disbs.</i>
					May	100.00 (11.2%)	0.00

Packaging cannot reconcile the existing 500.00 USD disbursement from the canceled award with the new scheduled monthly disbursements of 100.00 USD.

The Validation process contains logic to prevent this situation from occurring. When you validate a student's award, the Validation process checks to see if multiple instances of the same financial aid item type with different disbursement plans exist. If this is the case, the Validation process then checks to see if the first instance is a canceled or declined award. If it is, the Validation process then checks whether the award has been disbursed, partially or wholly. If disbursements have taken place, then the Validation process cancels the second instance with reject message 9581, "You have a disbursed award that is either canceled or declined that contains a different disbursement plan than your newest offer."

The Validation process performs this check on both loans and non-loans. To award a financial aid item type under a different disbursement plan, you must first run both the authorization and disbursement processes to back out the row contained under the old disbursement plan. If you want to keep the disbursement plan, you can then award a second instance using the same disbursement plan.

Sequencing Loan Awards

When entering additional Stafford subsidized loans or additional Stafford unsubsidized loans—as in the multiple NSLDS loan years in the same aid year scenario—it is important that the subsidized loans come before the unsubsidized loans in the award sequence. Although the student has additional eligibility in the second awarding session, the Stafford logic requires that any subsidized loans be sequenced before any unsubsidized loans. An example is provided below. In the following example, the subsidized Stafford #2 and unsubsidized Stafford #2 are the second financial aid item types used to award the additional amount the student is eligible for since the student has changed NSLDS loan years:

<i>First Awarding Session</i>			<i>Second Awarding Session</i>		
<i>Sequence of Award</i>	<i>Award</i>	<i>Aggregate Area</i>	<i>Sequence of Award</i>	<i>Award</i>	<i>Aggregate Area</i>
10	Subsidized Stafford #1	Subsidized Stafford	10	Subsidized Stafford #1	Subsidized Stafford
20	Unsubsidized Stafford #1	Unsubsidized Stafford	15	Subsidized Stafford #2	Subsidized Stafford
			20	Unsubsidized Stafford #1	Unsubsidized Stafford

<i>First Awarding Session</i>			<i>Second Awarding Session</i>		
			25	Unsubsidized Stafford #2	Unsubsidized Stafford

Note. Subsequent loan awards, after a change in NSLDS loan year, must be awarded using a different financial aid item type because of the change in NSLDS loan years.

Processing Direct Loan Adjustments

You can allocate up to 20 disbursements for Direct Loans—subsidized and unsubsidized, but not PLUS. Financial Aid enables you to package Direct Loan adjustments using the increased number of disbursements, particularly cases in which you have already made one or more disbursements for a student. When you set up disbursement IDs for your institution, remember that these 20 disbursements must cover both the Academic Award Period (AAP) and Non-standard Award Period (NSAP).

The Packaging functionality works only for students whose Direct Loan awards are set up in a particular way. Here is an example of the setup. A student's package includes a 800.00 USD subsidized Direct Loan at an institution using semesters, with three disbursement IDs per semester. This Direct Loan award must have a Loan Program Item Type of *Direct Loan*, and the disbursement split code must be Even Split Option *Even among first disb for Term*. If the 800.00 USD loan had a disbursement split code of *Even across all disbursements*, the Direct Loan functionality and rules would not apply to this award.

Important! If the Split Code option is not *Even among first disb for Term*, the Packaging process ignores any disbursements already made and repackages the student without regard to disbursement activity.

You must also set up your disbursement plans so that the first disbursement in a term is always a nonzero disbursement. To meet this requirement, the student with the 800.00 USD subsidized Direct Loan receives equal disbursements of 400.00 USD in the fall semester and 400.00 USD in the spring semester.

Your Direct Loan financial aid item types automatically inherit disbursement protection through the Direct Lending processing rules defined in Direct Lending and financial aid item type setup and the selection of *Even Among First Disbursement for Term* option. If you activate disbursement protection for a Direct Loan financial aid item type, all awards of that financial aid item type are repackaged without following the processing rules established for Direct Loans.

Packaging splits Direct Loans evenly among the first disbursement ID of a term when the award is first offered. Packaging fills the next undisbursed ID within the term when making award adjustments if the scheduled disbursements have been paid, thereby always protecting what has already been disbursed. This behavior is the same for all Direct Loans whether your institution is an MPN or non-MPN institution.

Direct Lending processing inherits the characteristics of *Even Among First Disbursement by Term* with disbursement protection activated. When a disbursement has already occurred with protected disbursement, the system moves any residual amount to the next undisbursed ID in the term. If all subsequent terms do not have any disbursed IDs, then the system updates the first ID in each term.

The number of adjustments that you can make to a Direct Loan award depends on the number of disbursement IDs for each term in the disbursement plan, and whether your institution is an MPN institution. The Direct Loan adjustment process determines whether the institution is an MPN institution based on the DL Serial MPN Activation check box on the Loan Institution Table page.

For non-MPN schools, if the MPN indicator is *No*, and no remaining undisbursed IDs exist in the term, after you have used all the disbursement IDs for any term, you can no longer automatically make changes to the student's award. At this point, you can make custom splits manually or you can create a new loan for the increase. While this example illustrates increases to the student's total award amount, the Direct Loan adjustment process also handles decreases to the student's total award amount.

If your institution is an MPN institution and the MPN indicator is *Yes*, and no remaining undisbursed IDs exist in a term to support the increase, the system distributes the residual amount (the original amount minus the new amount) to the next undisbursed ID across subsequent terms.

Here is an example of a loan increase for a MPN institution. You originally award a student a 4,500.00 USD Direct Loan. Three equal disbursements of 1,500.00 USD are scheduled (one per quarter). You disburse the first ID in the fall term:

4,500.00 USD (Original Award)						
	Fall		Winter		Spring	
Scheduled Amount (Disbursement ID)	1,500.00 D 01	0 D 02	1,500.00 D 03	0 D 04	1,500.00 D 05	0 D 06
Disbursed Amount	1,500.00	0	0	0	0	0

Then increase the award from 4,500.00 USD to 6,000.00 USD. When you modify a Direct Loan award, Packaging recalculates the total disbursement amount for each term, using the entire new award amount (rather than the residual or difference between the original award and the revised award). This value is referred to as the *term target amount*. The new term target amount is 2,000.00 USD. However, 1,700.00 USD has been fully disbursed in the fall term and no remaining disbursement IDs exist for the fall term. Therefore, the system distributes the additional 300.00 USD owed in the first term (2,000.00 USD minus 1,700.00 USD equals 300.00 USD) to any remaining undisbursed IDs:

6,000.00 USD (Increased Award Amount)						
	Fall		Winter		Spring	
Term Target Amount	2,000.00 USD		2,000.00 USD		2,000.00 USD	
Scheduled Amount (Disbursement ID)	1,500.00 D 01	200.00 D 02	2,150.00 D 03	0 D 04	2,150.00 D 05	0 D 06
Disbursed Amount	1,500.00	200.00	0	0	0	0

Handling Error Messages in Direct Loan Adjustments and Packaging

Five error messages explain errors encountered during the Direct Loan adjustment Packaging process. The following table provides the message number, message text, and an explanation of the circumstances:

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation of Circumstances</i>
9191	Disbursed amounts > awarded amounts; original award not changed.	The most common circumstances for this error are when you enter a manual award that has a value of less than the total award amount.
9192	Disb. amount < awarded disb. amt., but no disb. entry available for change.	This error message appears when the total disbursed to the student is less than the award amount but no disbursement IDs are available for further disbursements.
9193	At least 1 DL split award value is 0.00; Net split award amount is positive.	This error message appears when you use a custom split to redistribute the award, and then increase the award and revert to the original split code. This causes the gross split award entries to zero out. Then during validation, the gross split award amounts appear as zeros, while the net split amounts and disbursements appear as positive amounts. Because the gross split detail is missing, the Packaging process cannot logically evaluate the award. The Packaging process, therefore, rejects the award altogether and returns a zero value for the overall award amount.
9493	Award cannot be adjusted, because at least 1 set of term disbs. are fully used.	This error message appears when you attempt to repackage an award that has already used all the available disbursement IDs for one or more terms. The award amount does not change.

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation of Circumstances</i>
9494	Award disbursements cannot be evenly reduced; even division not possible.	As a first priority, Packaging attempts to spread a net decrease evenly across all terms. Whenever possible, the award amount is divided equally among all terms. However, this is not possible when a disbursement for an amount larger than the award amount divided by the number of terms has already been made in one term. In this case, the residual amount—award amount minus the amount already disbursed in the previously-mentioned term—is divided equally among the remaining terms.

See Also

Chapter 33, "Managing Special Cases in Packaging," Protecting Disbursements During Awarding, page 1178

Adjusting CommonLine Loan Item Types

CommonLine loans are highly dependent on the Packaging process. During the process of originating, transmitting, and receiving loan information from the loan servicer, changes to the loan award can affect the loan process. Conversely, changes to loan information by the lender can affect the loan award information in the student's package. After a CommonLine item type is awarded and accepted, it is ready for immediate processing by the loan program. The loan is originated and transmitted electronically to the loan servicer. After approval by the servicer, you can update the award in the student's package if the disbursement amounts and fees need to be corrected with the amounts confirmed by the lender. The system performs this automatically by the CommonLine and CRC loan inbound processes. After the loan is guaranteed, adjustments to the loan item type amounts trigger an adjustment to the loan by the loan origination process, and this information is transmitted to the loan servicer.

A problem exists when you change the loan item type while the loan is in transit to the servicer and a response has not yet been received by the school. If this occurs, the notification of the loan guarantee fails to load by the loan inbound processes if the amount of the item type no longer matches the amount of the loan. To resolve the issue, users must determine the proper corrective action. This often requires readjustment of the loan award so that the loan inbound processes can complete their task, and then readjusting again the loan award to the student's true eligibility.

To prevent this problem, Packaging no longer allows loan awards to be adjusted if an originated loan exists for the item type with a loan origination transmission status of *Transmitted*. Awards can be modified after the loan has been processed by the loan servicer and the approval (or rejection) of the loan has been loaded into the system. In cases where a school must modify the award amount, you can change the transmission status of the loan using the Override Loan Status component. You should perform this action after careful consideration, as additional actions may be required to ensure that the loan is correctly processed to completion.

See Also

[Chapter 36, "Processing CommonLine Loans," Receiving and Processing CL4 Inbound Files, page 1330](#)

[Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1271](#)

Awarding for Multiple Careers

This section provides an overview of awarding for multiple careers and discusses how to:

- Use award entry pages for multiple careers.
- Package sequential careers.
- Package replacement careers.
- Make award adjustments with multiple careers.
- Use Auto Packaging with multiple careers.
- Use Mass Packaging with multiple careers.

Understanding Awarding for Multiple Careers

Financial Aid enables you to package a student for one career for the first term and another career for one or more subsequent terms. You can also package a student for one career for the aid year, then later repackage the student with a different career for part of the aid year. PeopleSoft refers to this as "sequential career awarding."

You can also package a student for one career for the aid year and then replace the award package with awards for a second career for the aid year. The change in career would occur because the student changed to a different career for the aid year, prior to the start of the first term. PeopleSoft refers to this as "replacement career awarding."

For institutions with more than two terms, the system also allows you to award a student who changes from Career 1 for the aid year to Career 1 for Term 1 and Career 2 for Term 2 then back to Career 1 for Term 3. The system also supports awarding for students who change from Career 1 for the aid year to Career 1 for Term 1 and Career 2 for Term 2 and Career 3 for Term 3. This would be sequential career awarding with three careers instead of two.

Note. You cannot package a student for more than one career per term.

The Student's Field Audits page displays changes made to the student's Financial Aid term during the build process. This assists you in identifying students who may need award adjustments or budget updates based on a career change or other student record change.

Mass Packaging can also process students who have different careers in different terms within the aid year. Mass Packaging packages the student using one career, then packages them again using the other career. Awards made under the first career are considered existing (passive) awards when the student is packaged for the second career.

Using Award Entry Pages for Multiple Careers

Note. The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

The Career field on the award entry pages enables you to select the active career to be used for the current awarding session. If the student only has one career, then that career defaults into the Career field. You can make new awards or alter existing awards for the active career only. After you validate and post awards, or click the Reset button, you can select a different active career.

The non-active career and the awards associated with it are called a passive career and passive awards. Passive awards are listed first sequentially on the award entry page and active awards are listed below them. Passive awards and careers cannot be updated during the awarding session and are considered existing awards and careers. You cannot re-sequence active awards to intersperse them among passive awards.

The system considers passive awards first when it validates the awards, and passive awards are not changed by the system. Packaging includes awards for the passive career in the need summary amounts. Packaging also uses budget data for the passive career to calculate need summary amounts.

After you select a career and move out of the Career field, the Need Override check box is automatically selected for any existing awards—posted awards from an earlier awarding session—for the active career. You can choose to clear the Need Override check box on the existing awards for the active career.

Note. The Need Override check box does not override aggregate area maximums. So, if a student has multiple NSLDS loan years from their multiple careers—such as undergraduate senior and first-year graduate—and there are awards from the same aggregate area for both careers, the aggregate area maximums for the active career's NSLDS loan year are adhered to during validation.

Here is an example of how the Need Override check box functions with multiple NSLDS loan years and aggregate area limits. You award a 5,500.00 USD subsidized Stafford loan for the undergraduate career—senior NSLDS loan year—and validate and post the award. The aggregate total for the Stafford is 5,500.00 USD, which is the maximum allowed for a senior NSLDS loan year. Next, you award a 3,000.00 USD subsidized Stafford loan for the graduate career—first-year graduate NSLDS loan year—and validate and post that award. The aggregate total for the subsidized Stafford for the first-year graduate is 8,500.00 USD, which is the maximum allowed for a first year graduate NSLDS loan year. Now, you select the undergraduate career as the active career to add more awards. (The Need Override check box is automatically selected for the 5,500.00 USD subsidized Stafford award when you move out of the Career field because it is a previously posted award.) You add additional awards for the undergraduate career. When you validate and post the awards, the undergraduate career is active, the 5,500.00 USD subsidized Stafford award is reduced to 2,500.00 USD to stay within the aggregate maximum for a senior NSLDS loan year. The 3,000.00 USD subsidized Stafford made under the graduate career is added to the 2,500.00 USD from the undergraduate career making a total of 5,500.00 USD. This is the maximum allowed for a senior NSLDS loan year.

The following table gives an example of how you would use the Need Override check box in general. This is the award package the first time the student is packaged:

Career	Award	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant*	1,000.00 USD 1,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 Terms
Undergraduate	University Grant (no aggregate area associated)	2,000.00 USD 2,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate	Institutional Loan (no aggregate area associated)	750.00 USD 750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

This is the award package when you have reduced the Pell Grant so that it is awarded only for Term 1 (the student is a graduate student in Term 2) and you have selected the Need Override check box for the University Grant and Institutional Loan awards. Even though more need exists due to the reduced Pell Grant—the University Grant and Institutional Loan are not increased because the Need Override check box is selected.

Career	Award	Need Override	Amount	Term	Disb Plan	Split Code
Undergraduate	Pell Grant*		1,000 USD	1	01 – Term 1 and Term 2	02 – 100% in Term 1
Undergraduate/Graduate	University Grant	Check box selected	2,000 USD 2,000 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate/Graduate	Institutional Loan	Check box selected	750 USD 750 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

Packaging Sequential Careers

Note. The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

If a student is initially packaged for one career for the entire aid year and then changes to another career in a second or third term in the aid year, you can adjust the student's award by taking the steps outlined in this section. This situation generally occurs when a student changes careers part way through the aid year, and is called sequential career packaging.

The following step-by-step process should be used after the first term has begun and the student has been packaged for the entire aid year using one career. Then the Financial Aid Term Build process changes the student's career or the student informs the financial aid office that he or she has a different career for the second term.

To package sequential careers for a student:

1. Assume the student is in Career 1 for Term 1 and Term 2.
2. After Term 1 begins, the student changes to Career 2 for Term 2.
3. The Financial Aid Term build changes the student's career information, or you can change the career online.

Adjust the budget for Career 1 in Term 2 down to zero and build a new budget for Career 2 in Term 2.

Note. Reducing a budget to zero does not remove the budget record. When the career on Financial Aid term changes, the actual Financial Aid term record still exists. The records used in the initial awarding have the data changed, but they are not deleted.

4. Go to an award entry page.

The student's current awards—for Career 1 in Terms 1 and 2—are displayed.

5. Select Career 1 from the available Career options. All the awards for Career 1 are now available to be edited.
6. Reduce the awards for Career 1 based on the number of terms the student is actually in Career 1 for the aid year.

For example, if the student is Career 1 for Term 1 and Career 2 for Term 2, at a semester-based institution, reduce the student's Career 1 specific awards by one half. Departmental awards are an example of career-specific awards. If an award is not affected by a change in career, you do not need to adjust the award. For example, you may not need to adjust Perkins loans, Stafford loans, or University Grants. When you reduce an award, use a custom split to direct 100 percent of the award to Term 1 for Career 1 or specify a split code that distributes 100 percent of the award in Term 1 for Career 1. Validate and post your changes.

Note. If you do not reduce the awards for the first career before packaging with the second career, the student may not have any need with which to receive additional awards, and no awards are made for the second career. The student can also be over-awarded if the need for the second career is less than the need for the first career because the second career's budget is reduced.

7. Select Career 2 from the available Career options on the award entry page. The remaining awards for Career 1 in Term 1 are now considered passive awards and are displayed at the top of the sequence order. Award the student for Career 2 for Term 2. Be sure to use disbursement splits that direct the Career 2 awards to Term 2 for disbursement. You can award the student for Career 2 using Manual Packaging, Auto Packaging, or Mass Packaging. Disbursement plans and split codes are attached to careers and only the disbursement plans and split codes for the selected career are available when awarding.

Note. Use the Professional Judgement page to go back and make changes to awards for Career 1 after you have awarded for Career 2 if the awards you are changing have aggregate areas associated with them. For more information regarding this topic see the "Making Award Adjustments with Multiple Careers" section.

The following tables show an example of the first award package for Career 1, then the second award package for Career 2. In the example the student begins as an undergraduate for Terms 1 and 2, then changes to a graduate for Term 2. The following table shows the student's original package:

<i>Career</i>	<i>Award</i>	<i>Amount</i>	<i>Term</i>	<i>Disb Plan</i>	<i>Split Code</i>
Undergraduate	Pell Grant*	1,000.00 USD 1,000.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Undergraduate	Subsidized Stafford Loan	2,750.00 USD 2,750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

The following table shows the student's package with an additional subsidized Stafford loan because of the student's increased eligibility as a graduate student:

<i>Career</i>	<i>Award</i>	<i>Amount</i>	<i>Term</i>	<i>Disb Plan</i>	<i>Split Code</i>
Undergraduate	Pell Grant* (reduced)	1,000.00 USD 0.00 USD	1 2	01 – Term 1 and Term 2	Custom split with 100% in Term 1 OR 02 – 100% in Term 1
Undergraduate	Subsidized Stafford Loan	2,750.00 USD 2,750.00 USD	1 2	01 – Term 1 and Term 2	01 – Even Split across 2 terms
Graduate	Subsidized Stafford Loan#	3,000.00 USD	2	02 – Term 2 only	02 – Term 2 only

*Example based on Pell Grant awarding functionality for the 2009 and prior aid years.

#Additional loan for graduate eligibility. You can use the same financial aid item type because it is a new career.

You can also use this step-by-step process for students who change from Career 1 for the aid year to Career 1 for Term 1 then Career 2 for Term 2 and back to Career 1 for Term 3. You would go through the step-by-step process first for the change to Career 2 then again for the change to Career 3.

Packaging Replacement Careers

If a student is packaged for one career for the aid year and then changes careers for the entire aid year, you can replace the awards of one career for awards of another career. To do this, cancel all of the awards for the first career. Then award new awards for the second career, even though you may be awarding the same award(s) for the second career as you awarded for the first career.

You must build a Financial Aid term and budget for the new career before you can award for the new career.

Here are the steps for packaging students when they change from one career to another career for the entire aid year. In other words, the first career is replaced with a second career.

To package a replacement career for a student:

1. Assume the student is in Career 1 for Term 1 and Term 2, and that before Term 1 begins the student changes to Career 2 for Term 1 and Term 2.

The Financial Aid Term build changes the student's career information, or you can change the career online.

2. Reduce the Budget for Career 1 for Terms 1 and 2 down to zero and build a new Budget for Career 2 for Terms 1 and 2.
3. Go to an award entry page.

You see the awards for Career 1.

4. Select Career 1 in the Career field.

The Career 1 awards are now available to be edited.

5. Cancel all awards for Career 1.
6. Validate and post the canceled awards.

This discards all the awards for Career 1.

7. Select Career 2 in the Career field.
8. Enter all the awards for Career 2, even those that were canceled for Career 1.
9. Validate and post the awards you have entered for Career 2.

Making Award Adjustments with Multiple Careers

Sequential career packaging, one form of multi-career packaging, enables you to package a student for a first term in one career and subsequent term(s) in a second career. An example of when you use sequential career packaging is a student at a semester school who is a graduating fourth-year undergraduate in the fall semester and a first-year graduate student in the spring semester.

When you package this student, Packaging acknowledges the student's change in career by evaluating the student's NSLDS loan year, as indicated by the disbursement plan associated with the financial aid item type. If the financial aid item type has an aggregate area associated with it, Packaging uses the student's NSLDS loan year from the appropriate disbursement plan to associate the financial aid item type with the appropriate aggregate level on the aggregate area table to determine the correct aggregate limit for the student. Financial aid item types such as subsidized and unsubsidized Stafford Loans point to the same aggregate area for both undergraduate and graduate careers.

Normally, you package this student by packaging him or her as a fourth-year undergraduate for either the fall semester only or for the entire year prior to the start of the award year. Then, when the award year begins, you repackage the student as a first-year graduate for the spring semester. The student's award package includes the following financial aid item types:

<i>Fall Semester as Undergraduate</i>			<i>Spring Semester as Graduate</i>		
<i>Sequence</i>	<i>Description</i>	<i>Amount (USD)</i>	<i>Sequence</i>	<i>Description</i>	<i>Amount (USD)</i>
10	Federal SEOG Grant	2,000.00	60	University Grant	1,000.00
20	University Grant	1,950.00	70	Federal Work-Study	1,800.00
30	Federal Work-Study	1,800.00	80	Perkins Loan – ELO	3,000.00
40	Perkins Loan	2,500.00	90	Sub DL Stafford	3,000.00
50	Sub DL Stafford	5,500.00	100	Unsub DL Stafford	10,000.00

Packaging has used the NSLDS loan year values from the disbursement plans to identify the aggregate limits for his or her subsidized and unsubsidized Stafford Loans correctly. In the fall semester, the student receives a subsidized Stafford for 5,500.00 USD, the aggregate limit for fourth-year undergraduates in the subsidized Stafford aggregate area. The student does not receive an unsubsidized Stafford because he or she has already reached the aggregate limit for fourth-year undergraduates in the unsubsidized Stafford aggregate area. In the spring semester, the student receives an additional 3,000.00 USD subsidized Stafford loan, because the aggregate limit for first-year graduates is 8,500.00 USD, and the student has only received 5,500.00 USD in this aid year—as an undergraduate. The student also receives an unsubsidized Stafford loan for 10,000.00 USD because the aggregate limit for graduate students is higher than that for undergraduate students.

A problem can occur when you adjust the student's fall term after you have packaged the student as a graduate for the spring semester. When you adjust any undergraduate award, Packaging reevaluates the aggregate limit for any award that is associated with an aggregate area. If a graduate award exists within the same aid year associated with the same aggregate area as an undergraduate award, Packaging considers both the undergraduate and graduate amounts towards the undergraduate aggregate limit. Consequently, Packaging decreases the undergraduate award by the graduate award amount so that the undergraduate aggregate limit is not exceeded. For this student, if you adjust one of the fall semester awards (setting the student's University Grant to 1,450.00 USD) the student's subsidized Stafford loan decreases to 2,500.00 USD (undergraduate limit of 5,500.00 USD minus the graduate award of 3,000.00 USD).

<i>Fall Semester as Undergraduate</i>			<i>Spring Semester as Graduate</i>		
<i>Sequence</i>	<i>Description</i>	<i>Amount (USD)</i>	<i>Sequence</i>	<i>Description</i>	<i>Amount (USD)</i>
10	Federal SEOG Grant	2,000.00	60	University Grant	1,000.00
20	University Grant	1,450.00	70	Federal Work-Study	1,800.00
30	Federal Work-Study	1,800.00	80	Perkins Loan – ELO	3,000.00
40	Perkins Loan	2,500.00	90	Sub DL Stafford	3,000.00
50	Sub DL Stafford	2,500.00	100	Unsub DL Stafford	10,000.00

Packaging sets the subsidized Stafford to 2,500.00 USD while repackaging the student's fall semester awards because the student's spring semester award is associated with the same aggregate area as his or her fall Stafford award. Based on the spring semester subsidized Stafford award, Packaging determines that the student has exceeded his or her fourth-year undergraduate aggregate limit of 5,500.00 USD for subsidized Stafford loans. Therefore, Packaging decreases the student's fall subsidized Stafford loan award to 2,500.00 USD, so that the student is under the aggregate limit of 5,500.00 USD.

Packaging alerts you to a student whose award would be decreased in this situation. Packaging checks for the existence of two nonzero amounts for differing aggregate levels in an aggregate area within the same aid year for a student. If a student meets this criteria, an error message stating, "Student has an award with multiple aggregate levels; unable to package. Awards having multiple aggregate levels MUST be repackaged via Professional Judgement. DO NOT POST the set of awards generated in this Packaging Session, or it resets the loan to 0.00 USD and cancels all subsequent loan transactions. Repackage all awards via the Award Override page" appears. You may also see a shorter version of this error message: "Student has an award with multiple aggregate levels; unable to package."

Note. The error messages appear only for actions of *A—Accept*, *B—Accept/Offer*, and *O—Offer*. You can cancel or decline an award with multiple aggregate levels using any Packaging process.

If you receive either of the previously listed error messages, you must cancel out of the award entry page without posting the current transaction and repackage the student using the Professional Judgement page.

Warning! If you post the current transaction before exiting the award entry page, the student's award is reset to zero and the Loan Adjustment process begins.

Using Auto Packaging with Multiple Careers

When you are using Auto Packaging, only the packaging plans for the active career are available. Remember also, that the Packaging process evaluates any passive awards first before it auto packages awards for the active career.

Using Mass Packaging with Multiple Careers

Mass Packaging can also accommodate students with multiple careers. If a student with multiple careers—one career for the first term and another career for subsequent terms—is selected for Mass Packaging, the student is associated with multiple packaging plans based on their multiple careers and the selection criteria (packaging equations) associated with that career's packaging plan. Mass Packaging processes the student for the first career based on the processing order of the packaging plan, then awards for the second career based on the processing order of the packaging plan. The processing order for the packaging plans determines which packaging plan is used and, therefore, which career is packaged first. Awards made using a Career 1 packaging plan are passed on as passive awards to be included as part of any subsequent awarding for Career 2.

Note. Review the processing order for all your packaging plans to ensure that Mass Packaging selects the packaging plans, and, therefore, the careers, in the order you want. You enter the processing order on the Packaging Plan page, in the Processing Order field.

If you have students who have multiple careers (Career 1 and Career 2) and some students should be packaged for Career 1 first while others should be packaged for Career 2 first, you would need to run these two groups of students in separate Mass Packaging runs, changing the processing order on your packaging plans for each run. The packaging plan's processing order determines the order in which a career is packaged because the packaging plans are tied to careers.

You *cannot* allow students with posted awards in multiple careers to enter a Mass Packaging run to be selected for packaging plans for multiple careers. In live mode, Mass Packaging aborts without any messages if this is allowed. In simulation mode, your packaging results do not appear correct because the previous career's awards are not posted in simulation mode and, therefore, are not considered as existing awards when the second career is packaged. A student can have posted awards in multiple careers and go through Mass Packaging using *one* packaging plan for one career at a time.

Posted awards for multiple careers means the student has been awarded at least one award for Career 1 and at least one award for Career 2 and those awards are posted before the student is processed by Mass Packaging. To package students with posted awards in multiple careers using Mass Packaging, you should keep track of these students and only process them in Mass Packaging for one career at a time. The way to process students for one career at a time is to select the students, then make all but one of their careers invalid on the Mass Packaging by Students page or Institutional Mass Packaging by Student page. Assign packaging plans to the students. Then run Mass Packaging in simulation mode and review the results. If the results are correct, run Mass Packaging in live mode. This causes the awards to be posted for the first career. Now repeat the process for a second career.

Awards for the first career must be posted to be considered as existing awards for any subsequent career's packaging. When you run Mass Packaging in simulation mode with more than one career, when the second career is being packaged, the simulated awards packaged for the first career are not considered existing awards because they are not yet posted.

Understanding Multiple Award Period Processing

Multiple award period processing functionality enables you to process students for a subsequent award period without Packaging canceling awards for the initial award period or determining incorrect award amounts. It also enables you to use the same financial aid item type for the AAP and the NSAP. The ability to process awards in passive/active mode between award periods and the disbursement protection feature make this possible. An exception to this rule is subsequent awards—with aggregate area level limit rules—made to students because their NSLDS loan year has changed during the award year. You also cannot use the same financial aid item type for the AAP and NSAP for non-Direct Lending loans. In these cases, you must still use separate financial aid item types for each award period.

For example, you initially package a student for an award period, the AAP, and then at a later date you process the student for a subsequent award period, the NSAP. Normally, when you package the student for the NSAP, you do not want the awards for the AAP to change. Because Packaging employs passive/active mode processing, you can process the awards in the AAP as passive awards when awarding the NSAP. Packaging does not change passive awards; it preserves them, unlike active awards that are subject to change. However, Packaging still uses the award amounts of passive awards to determine remaining annual aggregate limits or other eligibility requirements and to update need summary balances.

See Also

Chapter 33, "Managing Special Cases in Packaging," Protecting Disbursements During Awarding, page 1178

Processing Awards for Multiple Award Periods Employing Passive/Active Mode

This section provides an overview of passive/active mode in multiple award period processing and discusses how to:

- Process sequential award periods.
- Process simultaneous award periods.

Understanding Passive/Active Mode in Multiple Award Period Processing

Packaging is able to treat awards made during an initial award period as passive awards when you are processing a subsequent award period for a student. Two factors determine whether an award is processed in active or passive mode. First is the award period attribute associated with the packaging plan you are currently using to package the student. If the award period attribute is *B – Both*, Packaging considers all awards made in either award period as active awards (active for evaluation or reevaluation). As a result, in the "Both" award period model, if you want to prevent any existing awards that you have disbursed from being reduced, you must employ disbursement protection (with the exception of Direct Loan awards, because the system's Direct Loan processing rules function like disbursement protection). If the award period attribute associated with the packaging plan is *A – Academic* or *N – Non-Standard*, and existing awards made in a previous award period contain a disbursement plan/split code pattern that does not equal the packaging plan's award period, then those awards are considered as passive awards by Packaging. Conversely, if existing awards made in a previous award period contain a disbursement plan/split code pattern that either agree with the designated award period of the packaging plan or span both award periods, then those awards are considered to be active awards, and, therefore, are reevaluated by Packaging. Only the disbursements in the active award period portion of the award are reevaluated. Reevaluation may cause the existing awards to be reduced based on the revised need situation as well as revised eligibility criteria. An award cannot be reduced below the total of the disbursements in the passive award period portion of the award.

Note. Because the packaging plan's Award Period attribute triggers the use of passive/active mode, you must use an additional field to use passive/active mode processing in Manual Packaging.

Warning! You must not activate disbursement protection for Direct Loan financial aid item types. If you activate disbursement protection for a Direct Loan, Packaging does not follow the processing rules established for Direct Loans and instead treats the Direct Loan award as it would any other disbursement-protected award.

The award period for an individual award is determined based on the disbursement plan/split code pattern of the award. If the disbursement plan/split code pattern spans only the AAP then the award is designated as "Academic." If the disbursement plan/split code pattern spans only the NSAP, then the award is designated as "Non-Standard." Finally, if the disbursement plan/split code pattern spans both the AAP and NSAP, then the award is designated as "Both." For all awards of a financial aid item type that you use in more than one award period, the disbursement plan must span both the AAP and NSAP. In other words, all AAP and NSAP terms must be defined. The split code can have scheduled disbursements in the AAP, the NSAP, or both award periods. For awards with a disbursement plan that includes both award periods, the split code determines the award period for that award. So if the split code indicates that all disbursements are scheduled for the AAP, the award is considered to have an award period of Academic even though the disbursement plan includes the AAP and NSAP.

Note. If you have more than one disbursement plan for a financial aid item type—because you assigned different disbursement plans to each instance of that financial aid item type—Packaging displays an error message indicating that different disbursement plans were found.

Awards within a packaging plan must contain disbursement plan/split code patterns that are compatible with the packaging plan's award period attribute. For example, an award can have a disbursement plan/split code pattern that is designated only for the AAP despite the award period attribute on the packaging plan designating an award period of *B – Both*. However, if the award's disbursement plan/split code pattern is designated for the AAP only, and the packaging plan's award period attribute is *N – Non-Standard*, then you receive error message 9580 after validation indicating that you must change either the award's disbursement plan/split code pattern or the packaging plan's award period attribute so that they are compatible.

If the disbursement plan/split code pattern of an award does not match the award period attribute of the packaging plan, Packaging treats that award as a passive award. For example, you are packaging a student for a trailing summer term using a packaging plan with an award period attribute of *N – Non-Standard*, and the student already has an existing departmental scholarship whose disbursement plan/split code pattern designates the award for the AAP. When you repackage the student for the NSAP, Packaging treats the departmental scholarship as a passive award because the packaging plan's award period attribute and the disbursement plan/split code pattern for the existing award do not match. If the existing award has a disbursement plan/split code pattern that spans both award periods, Packaging evaluates only the disbursements of the award in the award period that matches the packaging plan's award period attribute as active; the disbursements designated in the other award period are processed as passive and remain untouched.

There are two different business processes involving multiple award period processing. One involves sequential award period processing, the other simultaneous award period processing. Sequential award period processing involves packaging the student for an initial award period (AAP) and then packaging the student for a second, subsequent award period (NSAP). Simultaneous award period processing involves packaging the student for both award periods at the same time. An example of sequential award period processing is when a student enrolls at a community college for only one term—summer only or spring only—in one award period and then decides to return in a subsequent term resulting in a different award period. You use simultaneous award period processing for students that attend the institution for both award periods. If you have an academic program longer than 9 months, you might be packaging your students using simultaneous award period processing. However, setting up one award period that covers the entire academic program is the recommended business process.

Processing Sequential Award Periods

During sequential award period processing, make sure that the packaging plan's award period attribute is either *A – Academic* or *N – Non-Standard*, and not *B – Both*. This allows Packaging to employ passive/active mode, and directs Packaging to use the COA, EFC, and need for the designated award period.

As an example of sequential award period processing, you are processing a student's University Grant award of 150.00 USD for the summer term. Your semester-based institution treats the summer term as a leading summer. The following table gives the student's COA, EFC, and need for both the NSAP and AAP—all values are in U.S. dollars (USD):

	<i>Non-Standard Award Period</i>	<i>Academic Award Period</i>
COA	3,200.00	25,000.00
EFC	3,000.00	11,000.00

	<i>Non-Standard Award Period</i>	<i>Academic Award Period</i>
Need	200.00	14,000.00

You first need to assign a disbursement plan that spans both the NSAP—for the leading summer term—and the AAP because the student may subsequently be eligible to receive additional University Grant funding in the AAP. In this case, you can use the same financial aid item type in both the NSAP and AAP. However, in this first pass, the disbursement split code assigned to the award should have all disbursements scheduled only in the NSAP (leading summer term).

The following table illustrates how you set up the University Grant award for the student where the disbursement plan that covers both award periods has an ID of 10 and the split code that disburses 100 percent of the award in the leading summer term has an ID of 02:

<i>Seq No</i>	<i>FA Item Type</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Disbursements – NSAP (in USD)</i>	<i>Disbursements – AAP (in USD)</i>
10	University Grant	10	02	150.00 (100%)	0 (0% fall, 0% spring)

When Packaging processes the student for this University Grant, it takes into account the COA, EFC, and need for only the designated NSAP. Remember, the disbursement plan/split code pattern coupled with the packaging plan's award period attribute determines the designated award period. Although the disbursement plan spans both award periods, the split code dictates that the award period should be nonstandard. Therefore, Packaging uses the student's COA, EFC, and need information only for the NSAP when packaging the student.

The student then decides to attend your institution in the fall semester. He or she is eligible for a 1,200.00 USD University Grant during the AAP. You create a second packaging plan with an award period attribute of *Academic* that contains a packaging rule containing the University Grant financial aid item type. You assign the same disbursement plan as the summer-only University Grant. However, you must use a split code that distributes the award only in the AAP. For this example, split code ID 01, which distributes the award in two disbursements—50 percent in the fall semester and 50 percent in the spring semester—is used.

The following table illustrates the two University Grant awards for the student:

<i>Seq No</i>	<i>FA Item Type</i>	<i>Disb Plan</i>	<i>Split Code</i>	<i>Disbursements – NSAP (in USD)</i>	<i>Disbursements – AAP (in USD)</i>
10	University Grant	10	02	150.00 (100%)	0 (0% fall, 0% spring)
15	University Grant	10	01	0 (0%)	600.00 (fall), 600.00 (spring) (50% fall, 50% spring)

When Packaging runs for the second University Grant under the AAP designated packaging plan, it takes into account only the COA, EFC, and need for that designated award period. Because the University Grant award contains disbursements targeted only to the AAP—based on its disbursement plan/split code pattern—Packaging uses information only for the AAP when packaging the student. Because the first University Grant award only affects need for the NSAP, Packaging does not consider the first award of 150.00 USD during calculations for the AAP. Remember that this example is based on using a leading summer. If your institution uses a trailing summer, you would define the disbursement plan/split code pattern accordingly.

The Award Posting process merges the two instances of the University Grant into a single award because they are generated from the same financial aid item type and share the same disbursement plan. However, the Award Posting process merges the two discrete splits into one custom split, and displays XX in the Split field to indicate the custom split. The Award Posting process retains the separate disbursements called for by the two University Grant awards, and the Need Summary page reflects these separate disbursements.

The following screen shots illustrate how the Award Posting process handles the two instances of the University Grant. In the first shot, both instances of the financial aid item type are visible.

The navigation path to the page is Financial Aid, Awards, Award Processing, Assign Awards to a Student.

The screenshot shows the 'Student Aid Package' page for Pete F. Ambrose. The page includes tabs for 'Student Aid Package', 'Need Summary', and 'Term Summary'. Key information includes: ID: FAPK0131, Institution: PSUNV, Aid Year: 2005, Career: UGRD (Undergrad), Packaging Plan ID: (empty), Award Period: Both, Aggregate Source: Default, Package Status: Applied. There are buttons for 'Validate', 'Post', 'Retrieve', and 'Reset'. A link for 'Award Notification' is also present. Below this is a table with two tabs: 'Award' and 'Status'. The 'Award' tab is active, showing a table with columns: *Nbr, Action, Career, Item Type, Description, Offered, Accepted, Disb Plan, *Split Code, and a link to 'Disbursement'. Two rows are visible, both for 'Honors Scholarship' with Item Type '9000000000006'.

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	Disbursement
10		UGRD	9000000000006	Honors Scholarship	150.00	0.00	02	02	Disbursement +
20		UGRD	9000000000006	Honors Scholarship	600.00	0.00	02	05	Disbursement +

Student Aid Package page with two instances of Honors Scholarship

The next two screen shots show the disbursement detail for each instance of the Honor Scholarship.

The screenshot shows the 'Award Disbursement Detail' page for the first instance (Sequence 10). It displays the Item Type '9000000000006', Net Award Amount '\$150.00', Disbursement Plan '02', and Split Code '02'. There is a checkbox for 'Custom Split'. Below this is a table titled 'Disbursement Distribution' with columns: Disb ID, Term, Award Period, Level, Offered, Accepted, Net Disb Balance, and Disbursed. The table shows three rows of disbursement data.

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0522	Non Std		150.00	0.00	150.00	0.00
02	0530	Academic		0.00	0.00	0.00	0.00
03	0540	Academic		0.00	0.00	0.00	0.00

Award Disbursement Detail page for the first instance of the Honors Scholarship

Award Disbursement Detail

*Sequence: 20 Item Type: 9000000000006 Net Award Amount: \$600.00

Disbursement Plan: 02 *Split Code: 05 ☐ Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0522	Non Std		0.00	0.00	0.00	0.00
02	0530	Academic		300.00	0.00	300.00	0.00
03	0540	Academic		300.00	0.00	300.00	0.00

Award Disbursement Detail page for the second instance of the Honors Scholarship

The next screen shot shows how the two instances of the University Grant financial aid item type are combined after posting. Notice that the Split field contains XX, indicating a custom split:

Student Aid Package Need Summary Term Summary

Ambrose, Pete F ID: FAPK0131 Institution: PSUNV

Aid Year: 2005 Financial Aid Year 2004-2005

Career: UGRD Undergrad [Award Notification](#)

Packaging Plan ID: Aggregate Source: Default Validate Post

Award Period: Both Package Status: Completed Retrieve Reset

Award		Status							
*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
20		UGRD	9000000000006	Honors Scholarship	750.00	0.00	02	XX	Disbursement +

Student Aid Package page after posting—the two separate instances are combined, with a custom split

When you look at the disbursement detail for the University Grant, you can see that Packaging has retained the disbursements dictated by the two separate instances of the University Grant

Award Disbursement Detail

*Sequence: 20 Item Type: 9000000000006 Net Award Amount: \$750.00

Disbursement Plan: 02 *Split Code: XX ☐ Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0522	Non Std		150.00	0.00	150.00	0.00
02	0530	Academic		300.00	0.00	300.00	0.00
03	0540	Academic		300.00	0.00	300.00	0.00

Award Disbursement Detail page for the combined Honors Scholarship

The Need Summary page also retains the separate disbursements:

Student Aid Package		Need Summary		Term Summary	
Ambrose,Pete F				ID:	FAPK0131
Aid Year: 2005 Financial Aid Year 2004-2005				Institution:	PSUNV
Need Summary by Award Period Find First 2 of 2 Last					
Award Period: Non Standard		EFC Status: Official			
Fed Year COA:	6,400.00	Inst Year COA:	6,400.00	Pell Year COA:	2,694.00
Prorated EFC:	147	Institutional EFC:	0	Alt Pell COA:	2,526.00
Fed Need:	6,253.00	Inst Need:	6,400.00		
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	150.00	N/B Aid (Inst):	150.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	150.00	Total Aid (Inst):	150.00		
Unmet Need (Fed):	6,103.00	Unmet Need (Inst):	6,250.00		
Unmet COA(Fed):	6,250.00	Unmet COA(Inst):	6,250.00		

Need Summary page displaying AAP information and disbursements

Student Aid Package		Need Summary		Term Summary	
Ambrose,Pete F				ID:	FAPK0131
Aid Year: 2005 Financial Aid Year 2004-2005				Institution:	PSUNV
Need Summary by Award Period Find First 1 of 2 Last					
Award Period: Academic		EFC Status: Official			
Fed Year COA:	22,700.00	Inst Year COA:	22,700.00	Pell Year COA:	20,006.00
Prorated EFC:	3,366	Institutional EFC:	0	Alt Pell COA:	10,174.00
Fed Need:	19,334.00	Inst Need:	22,700.00		
Montgomery GI Bill/AmeriCorps:	0	Montgomery GI Bill/AmeriCorps:	0		
N/B Aid (Fed):	600.00	N/B Aid (Inst):	600.00		
Special Need/Cost Aid (Fed):	0.00	Special Need/Cost Aid (Inst):	0.00		
Total Aid (Fed):	600.00	Total Aid (Inst):	600.00		
Unmet Need (Fed):	18,734.00	Unmet Need (Inst):	22,100.00		
Unmet COA(Fed):	22,100.00	Unmet COA(Inst):	22,100.00		

Need Summary page displaying NSAP information and disbursements

Important! The disbursement plan/split code pattern enables Packaging to maintain the integrity of each award and therefore its disbursements by award period. Using this functionality, you can use the same financial aid item type across award periods.

Loans and Sequential Award Period Processing

The origination requirements of loans affect your ability to use sequential award period processing and passive/active mode. For non-Direct Lending loans you originate—such as CommonLine or Perkins loans—regulatory requirements dictate that you cannot assign a disbursement plan/split code pattern with a zero disbursement in any disbursement cycle and, therefore, in any award period. However, assigning a disbursement plan that covers both award periods, as required by the procedures for sequential award period processing outlined in this section, results in one award period having a zero disbursement. For example, if you are awarding a student a CommonLine loan for the AAP, you assign the loan a disbursement plan that covers both award periods, in case you package the student for the trailing NSAP with another instance of the CommonLine loan. Then you give the award a split code that disburses 50 percent in the fall semester, 50 percent in the spring semester, and 0 percent in the trailing summer term. If you submit this loan, it does not originate because of the zero disbursement in the trailing summer term. To award non-Direct Lending loans during sequential award period processing you must use separate financial aid item types and disbursement plans, each for the AAP or the NSAP alone.

For Direct Lending loans, you can use the same financial aid item type for both the AAP and the NSAP. However, you cannot have a zero disbursement in the disbursement cycle of the first term for the Direct Lending loan. This means that you can have a zero disbursement in a trailing summer term, but you cannot have a zero disbursement in a leading summer term.

Processing Simultaneous Award Periods

During simultaneous award period processing, make sure that the packaging plan's award period attribute is *B – Both*, and not *A – Academic* or *N – Non-Standard*. This directs Packaging to use the COA, EFC, and need for both award periods, and also indicates that all awards for both award periods can be repackaged unless they are locked or have disbursement protection activated.

During simultaneous award period processing, Packaging evaluates maximum eligibility for need across award periods. Packaging first identifies the student's maximum need, and then it schedules disbursements according to need for the respective award period.

For example, you have a student attending for both award periods and you are going to award a University Grant to the student for both award periods at one time. Your semester-based institution treats the summer term as a trailing summer. The following table provides the COA, EFC, and need for the student—all values are in U.S. dollars (USD):

	<i>Academic Award Period</i>	<i>Non-Standard Award Period</i>	<i>Combined</i>
COA	25,000.00	3,200.00	28,200.00
EFC	11,000.00	2,000.00	13,000.00
Need	14,000.00	1,200.00	15,200.00

The total value of the University Grant that you plan to offer the student is 5,000.00 USD. To begin awarding, create a packaging plan with an award period attribute of *Both*, and create a packaging rule for the University Grant with a disbursement plan that spans both the NSAP and the AAP, and a disbursement split code that contains disbursements scheduled in both award periods. For this example, the split code used—split code ID 03—directs Packaging to schedule one disbursement per academic term, with 45 percent of the disbursement awarded in the fall semester, 45 percent of the disbursement awarded in the spring semester, and 10 percent of the disbursement awarded in the trailing summer term. Based on this disbursement plan/split code pattern, Packaging matches the award period attribute for this award (Both).

The following table illustrates how you set up the University Grant award for the student and provides the scheduled disbursements based upon the 45/45/10 split of the 5,000.00 USD total award:

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	10	03	2,250.00 (fall), 2,250.00 (spring) (45% fall, 45% spring)	500.00 (10%)

When Packaging processes the student for this University Grant, it takes into account the COA, EFC, and need for both award periods. Because the packaging plan award period is *Both* and the disbursement plan/split code pattern for the University Grant is *Both*, the COA, EFC, and need values for the two award periods are combined. The combined need value determines the student's maximum award eligibility. The scheduled disbursements for this award do not exceed the student's eligibility for each award period so they are validated.

Important! Packaging maximizes need per packaging run. This fact is important when EFC exceeds COA for one award period. This means that need in one award period is not reduced when additional EFC is available from another award period.

What would happen if EFC exceeded COA for one award period in the previous example? The same conditions exist: you have a student attending for both award periods, you are going to award a University Grant of 5,000.00 USD to the student for both award periods at one time, and your semester-based institution treats the summer term as a trailing summer. The following table provides the new COA, EFC, and need for the student—all values are in U.S. dollars (USD):

	Academic Award Period	Non-Standard Award Period	Combined
COA	25,000.00	3,200.00	28,200.00
EFC	11,000.00	3,400.00	14,400.00
Need	14,000.00	0.00	14,000.00

EFC exceeds COA for the NSAP. However, because Packaging maximizes need per packaging run, the student's total need for the two award periods is 14,000.00 USD. In other words, Packaging does not apply excess EFC—200.00 USD in the NSAP—from one award period to the other award period.

To begin awarding, create a packaging plan with an appropriate award period attribute, and create a packaging rule for the University Grant with an appropriate disbursement plan and disbursement split code. For this award, you have several options.

Option 1:

You can assign the University Grant a disbursement plan that is targeted only for the AAP, and a split code that divides the disbursement evenly between the two academic semesters. Based on this disbursement plan/split code pattern, Packaging designates the award period for this award as Academic. The following table provides the scheduled disbursements based upon the 50/50 split of the 5,000.00 USD award where the disbursement plan that spans only the AAP has an ID of 15 and the split code that divides the disbursement evenly between the two academic semesters has an ID of 01:

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	15	01	2,500.00 (fall), 2,500.00 (spring) (50% fall, 50% spring)	0.00 (No need)

When Packaging processes the student, it takes into account the COA, EFC, and need for only the designated award period. Because the disbursement plan/split code pattern for the University Grant is targeted to the AAP, only the COA, EFC, and need values for the AAP are considered. However, other awards within the student's aid package can have disbursement plan/split code patterns that are targeted to both the AAP and NSAP.

Option 2

You can also assign the University Grant the same disbursement plan as in the previous example, spanning both the NSAP and the AAP, and the same disbursement split code (disbursements scheduled in both award periods). For this example, the split code used (split code ID 03) directs Packaging to schedule one disbursement per academic term, with 45 percent of the disbursement awarded in the fall semester, 45 percent of the disbursement awarded in the spring semester, and 10 percent of the disbursement awarded in the trailing summer term. Based on this disbursement plan/split code pattern, Packaging designates the award period attribute for this award as Both. However, because the student does not have need in the NSAP, during validation Packaging distributes the 500.00 USD that would have been scheduled for the trailing summer term among the two semesters of the AAP using relative weighting provided sufficient AAP need remains. Because the disbursement percentages for the fall and spring semesters are equal, each semester receives an additional 250.00 USD.

Packaging determines the relative weighting for each term by dividing the original disbursement percentage of the term, 45 percent, by the sum of all disbursement percentages for terms within the award period, 90 percent. For this example, Packaging does the following calculations:

Remainder Calculation for Fall Semester = $45/90 * 500.00 = 250.00$

Remainder Calculation for Spring Semester = $45/90 * 500.00 = 250.00$

Total Disbursement for Fall Semester = $250.00 + 2,500.00 = 2,500.00$

Total Disbursement for Spring Semester = $250.00 + 2,500.00 = 2,500.00$

The following table illustrates how you set up the University Grant award for the student, and provides the scheduled disbursements based upon the redistribution of the 500.00 USD originally scheduled for the NSAP

Seq No	FA Item Type	Disb Plan	Split Code	Disbursements - AAP	Disbursement - NSAP
10	University Grant	10	03	2,500.00 (fall), 2,500.00 (spring) (45% fall + 45/90 x 500.00, 45% spring + 45/90 x 500.00)	0.00 (10% originally scheduled, but shortage of need)

See Also

Chapter 33, "Managing Special Cases in Packaging," Distributing Awards When a Shortage of Need Exists in One Award Period, page 1175

Using Passive/Active Mode in Manual Packaging

This section provides an overview of passive/active mode in Manual Packaging and provides examples of:

- Processing sequential award periods.
- Awarding for a single award period followed by both award periods.
- Awarding for both award periods followed by a single award period.

Understanding Passive/Active Mode in Manual Packaging

For Packaging to determine whether awards are active or passive, the process needs to evaluate the award period for which you are packaging the student. Packaging compares the award period for which you are currently packaging against the disbursement plan/split code patterns of existing awards to determine whether to process them as active or passive awards. During Auto and Mass Packaging, Packaging uses the packaging plan award period attribute for this comparison. Because Manual Packaging does not employ packaging plans, the Award Period field on the award entry pages enables you to specify the award periods this packaging session covers.

Before you begin awarding manually, select an award period processing mode in the Award Period field. The default value for this field is *Both – Both Award Periods*, so if you do not change the value in this field, all existing awards are reevaluated based on need and eligibility for both the academic and NSAPs. After you select an award period processing mode, Packaging evaluates all existing awards to determine which awards fall within the selected award period and, therefore, can be changed. These awards are considered active. You cannot change awards that do not match the selected award period. These awards are considered passive and are made unavailable on the award entry pages.

Note. The Award Period field serves as a target for Packaging and is not a characteristic of the awards in this packaging session. This field controls which existing posted awards are treated as active or passive awards.

To determine which awards you can change, Packaging compares the selected award period against the disbursement plan/split code patterns of existing awards. Packaging does this by evaluating all nonzero disbursement rows for each award. Each disbursement ID within the disbursement plan is tied to a term, and each term has been designated for either the AAP or the NSAP. If all the nonzero disbursements belong to the AAP, Packaging considers the award for AAP processing. If all the nonzero disbursements belong to the NSAP, Packaging considers the award for NSAP processing. If the nonzero disbursements span both the AAP and the NSAP, Packaging considers the award for both AAP and NSAP processing.

Packaging then compares the type of processing (AAP, NSAP, or both) for which an award is eligible based on the selected award period processing mode. If the award period processing mode is *Academic*, then Packaging processes the awards whose nonzero disbursements all fall in the AAP as active awards. If the award period processing mode is *Non-Standard*, then Packaging processes the awards whose nonzero disbursements all fall in the NSAP as active awards. Packaging evaluates awards whose nonzero disbursements span both the AAP and the NSAP in a slightly different fashion than those awards that fall within a single award period. If the award period processing mode is *Academic*, Packaging processes the award as an active award but reevaluates only the portion of the award designated for the AAP. This portion consists of the nonzero disbursements tied to terms designated for that award period. If the award period processing mode is *Non-Standard*, Packaging processes the award as an active award but reevaluates only the portion of the award designated for the NSAP. If the award period processing mode is *Both*, Packaging processes the award as an active award and reevaluates the entire award.

If the disbursement plan/split code pattern of an existing award designates an award period that does not match the selected award period processing mode, the award is passive and therefore cannot be changed by either you or Packaging when submitted for validation. Passive awards are unavailable on the award entry pages to indicate visually that you and Packaging cannot change them. Active awards are open and available on the award entry pages to indicate visually that you and Packaging can change them.

When you add new awards, the disbursement plan/split code pattern of the new award must match or fall within the selected award period processing mode. If the disbursement plan/split code pattern of the award designates it for a single award period (for example, the AAP) that does not match the single award period selected as the award period processing mode (*Non-Standard*) you receive error message 9580 after validation. This message indicates that you must change either the award's disbursement plan/split code pattern or the award period processing mode so that the award's designated award period and the award period processing mode match. If the disbursement plan/split code pattern of the award designates that it is for both award periods when a single award period is selected as the award period processing mode, the Validation process assigns the award only to those disbursement IDs designated for the award period selected as the award period processing mode.




The following three sections describe three different awarding scenarios and the behavior of Packaging.

Processing Sequential Award Periods


Note. The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.


You can use any of the award entry pages to process the student for discrete award periods. For example, at a semester-based institution with a trailing summer term, you award a student a 2,700 USD Pell Grant for the AAP. The disbursement plan is for both semesters in the AAP, and the split code—set up as a custom split—calls for a 1,350.00 USD disbursement in the fall semester and a 1,350.00 USD disbursement in the spring semester. The following screen shot displays this award on the Student Aid Package page:

Student Aid Package | **Need Summary** | **Term Summary**

Elkins, Stacy G **ID:** FAPK0132   



Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Career:  Undergrad [Award Notification](#)

Packaging Plan ID:  **Aggregate Source:**

Award Period: **Package Status:**


Award | **Status**




*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	9000000000100	Federal Pell Grant	2,700.00	0.00	AT	XX 	Disbursement <input type="button" value="+"/>

Student Aid Package page displaying the student's award for the AAP (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)

Award Disbursement Detail

*Sequence: **Item Type:** 9000000000100 **Net Award Amount:** \$2,700.00

Disbursement Plan: AT ***Split Code:**  ☐ Custom Split

Disbursement Distribution [Customize](#) | [Find](#)  First  1-3 of 3  Last

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0530	Academic	U1	1,350.00	0.00	1,350.00	0.00
02	0540	Academic	U1	1,350.00	0.00	1,350.00	0.00
03	0545	Non Std	U1	0.00	0.00	0.00	0.00

Award Disbursement Detail page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)

The student then decides to attend the trailing summer term, and you award the student a 1,000.00 USD Honors Scholarship for the NSAP. Before you manually enter this award, you must select *Non Std – Non-Standard* as the award period because you want to process the student for the NSAP and leave the existing Pell Grant award for the AAP untouched. When you select *Non Std – Non-Standard*, Packaging determines that the Pell Grant award is designated for the AAP and does not match the selected award period value, so it treats it as a passive award and makes the row unavailable. Now you cannot change the Pell Grant award, and Packaging does not reevaluate it when you validate the new award.

Insert a new row and add the 1,000.00 USD Honors Scholarship with a disbursement plan/split code pattern that distributes the award in the trailing summer term. When you validate this award, Packaging evaluates only this award and processes the Pell Grant award as a passive award.




Student Aid Package

Need Summary

Term Summary

Elkins, Stacy G


ID: FAPK0132



Aid Year: 2005


Financial Aid Year 2004-2005

Institution: PSUNV

Career: UGRD 

Undergrad

[Award Notification](#)

Packaging Plan ID: 

Aggregate Source: Default

Validate

Post

Award Period: Non Std





Package Status: Completed

Retrieve

Reset

Award

Status

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	
10		UGRD	9000000000100	Federal Pell Grant	2,700.00	0.00	AT	XX	Disbursement 
20		UGRD	9000000000006	Honors Scholarship	1,000.00	0.00	AT	01 	Disbursement 

Student Aid Package page with new Honors Scholarship award and Federal Pell Grant (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)


Award Disbursement Detail

*Sequence: 20

Item Type: 9000000000006


Net Award Amount: \$1,000.00



Disbursement Plan: AT

*Split Code: 01 

☐ Custom Split

Disbursement Distribution

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First  1-3 of 3  Last

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0530	Academic		0.00	0.00	0.00	0.00
02	0540	Academic		0.00	0.00	0.00	0.00
03	0545	Non Std		1,000.00	0.00	1,000.00	0.00

Award Disbursement Detail page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)

If you want to reevaluate the student's awards for both award periods, you can selected *Both* as the award period after you have posted the Honors Scholarship. Both the Pell Grant and the Honors Scholarship are then available for changes, and Packaging treats both awards as active awards and reevaluates them based on need and eligibility criteria/rules. These rows remain available and open.

Student Aid Package		Need Summary	Term Summary						
Elkins, Stacy G		ID:	FAPK0132						
Aid Year: 2005 Financial Aid Year 2004-2005		Institution:	PSUNV						
Career:	UGRD	Undergrad	Award Notification						
Packaging Plan ID:		Aggregate Source:	Default						
Award Period:	Both	Package Status:	Completed						
<input type="button" value="Validate"/> <input type="button" value="Post"/>		<input type="button" value="Retrieve"/> <input type="button" value="Reset"/>							
Award		Status							
*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	9000000000100	Federal Pell Grant	2,700.00	0.00	AT	XX	Disbursement
20		UGRD	9000000000006	Honors Scholarship	1,000.00	0.00	AT	01	Disbursement

Student Aid Package page (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)

Awarding for a Single Award Period Followed by Both Award Periods

Note. The following examples are based on Pell Grant awarding functionality for the 2009 and prior aid years.

You can award a student for a single award period, either AAP or NSAP, and later award the student for both award periods. When you award the student for both award periods, all awards—no matter what award period the award's disbursement plan/split code pattern designates—can be changed and are processed as active awards.

For example, at a semester-based institution with a trailing summer term, you award a student a 3,300.00 USD Pell Grant for the AAP. The disbursement plan is for both semesters in the AAP, and the split code—set up as a custom split—calls for a 1,650.00 USD disbursement in the fall semester and a 1,650.00 USD disbursement in the spring semester. The following screen shot displays this award on the Student Aid Package page:

Student Aid Package
Need Summary
Term Summary

Emoto,Chima
ID: FA0117

Aid Year: 2001 Financial Aid Year 2000-2001
Institution: PSUNV

Career: UGRD Undergrad
Packaging Plan ID: FEDERAL
Award Period: Academic
Aggregate Source: PS
Package Status: Applied

Award Notification
Validate Post
Retrieve Reset

Award
Status

*Nbr	Action	Career	*Item Type	Description	Offered	Accepted	*Disb Plan	*Split Code
10		UGRD	9000000000100	Federal Pell Grant	3,300.00	3,300.00	01	XX

Student Aid Package page displaying the student's award for the AAP (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)

The student is then awarded a 5,000 USD Honors Scholarship that covers the trailing summer term in addition to the academic year, with 40 percent disbursed in fall (AAP), 40 percent disbursed in spring (AAP), and 20 percent disbursed in the trailing summer term (NSAP). Before you manually enter this award, you must select *Both* as the Award Period because you want to process the student for both the NSAP and the AAP. When you select *Both*, Packaging determines that the Pell Grant award is active because its disbursement plan/split code pattern designates it for the AAP, which falls within the chosen award period processing mode. Now you can change the Pell Grant award, and Packaging reevaluates it when you validate the new award. Because you are only adding the Honors Scholarship, you do not need to change the Pell Grant. Insert a new row, and add the 5,000.00 USD Honors Scholarship, choosing a disbursement plan that spans both award periods, and a split code that distributes the award 40 percent fall, 40 percent spring, and 20 percent summer. When you validate this award, Packaging evaluates both awards.

Warning! If there has been a change in the student's need or eligibility, the existing award is changed unless you have activated disbursement protection for that financial aid item type. Activating disbursement protection only protects the disbursed portion of the award. The award itself can be reduced to the level of the disbursed amount.

Student Aid Package

Need Summary

Term Summary

Emoto,Chima

ID: FA0117

Aid Year: 2001 Financial Aid Year 2000-2001

Institution: PSUNV

Career: UGRD Undergrad

Packaging Plan ID: FEDERAL

Award Period: Both

Aggregate Source: PS

Package Status: Applied

Award Notification

Validate

Post

Retrieve

Reset

Award		Status								
*Hbr	Action	Career	*Item Type	Description	Offered	Accepted	*Disb Plan	*Split Code		
10		UGRD	900000000100	Federal Pell Grant	3,300.00	3,300.00	01	XX		
20	B	UGRD	900000000006	Honors Scholarship	5,000.00	5,000.00	12	01		

Student Aid Package page with an Award Period value of Both, adding the Honors Scholarship (Based on Pell Grant awarding functionality for the 2009 and prior aid years.)




Awarding for Both Award Periods Followed by a Single Award Period

You can award a student for both award periods and later award the student for a single award period, either the AAP or the NSAP. When you award the student for a single award period, only those awards with disbursement plan/split code patterns that fall within or span the designated award period can be changed and are processed as active awards. Awards whose disbursement plan/split code patterns designate an award period that does not match the designated award period mode are treated as passive awards.


Warning! Although you intend to reevaluate only a single award period, Packaging also reevaluates the portion that falls within that single award period of existing awards that span both award periods. If there has been a change in the student's need or eligibility that warrants a change in the award, Packaging adjusts the existing awards.


For example, at a semester-based institution with a trailing summer term, you award a student a 5,000 USD Honors Scholarship that covers the trailing summer term in addition to the academic year, with 40 percent disbursed in fall, 40 percent disbursed in spring, and 20 percent disbursed in the trailing summer term. The following screen shot displays this award on the Student Aid Package page:


Student Aid Package | **Need Summary** | **Term Summary**


Masters, Matt G **ID:** FAPK0133   


Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Career:  Undergrad [Award Notification](#)







Packaging Plan ID: 

Award Period: 

Aggregate Source: 

Package Status: 

Award | **Status**


*Hbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	9000000000006	Honors Scholarship	5,000.00	0.00	AT	08 	Disbursement 
20		UGRD	9000000000304	Sub Staff - Sem	2,625.00	0.00	AT	09 	Disbursement 




Student Aid Package page displaying the student's award for both award periods

Then you offer the student a 2,625.00 USD subsidized Stafford loan for the academic year. Before you manually enter this award, you must select *Academic* as the award period, because you want to process the student only for the AAP. When you select *Academic*, Packaging determines that the Honors Scholarship is active because its disbursement plan/split code pattern designates it for both award periods, which spans the chosen award period processing mode of *Academic*.

Award Disbursement Detail

*Sequence: **Item Type:** 9000000000006 **Net Award Amount:** \$5,000.00

Disbursement Plan: AT ***Split Code:**  ☐ Custom Split

Disbursement Distribution [Customize](#) | [Find](#)  First  1-3 of 3  Last

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0530	Academic		2,000.00	0.00	2,000.00	0.00
02	0540	Academic		2,000.00	0.00	2,000.00	0.00
03	0545	Non Std		1,000.00	0.00	1,000.00	0.00

Award Disbursement Detail page

Now you insert a second row and enter the 2,625 USD subsidized Stafford loan, with a disbursement plan/split code pattern that spans only the AAP. You can also change the Honors Scholarship award, and Packaging reevaluates it for need and eligibility when you validate the new award. However, Packaging changes only the disbursements in the AAP; the NSAP portion of the award remains unchanged.

Warning! Even if you do not change or intend to change the Honors Scholarship, the AAP portion of the award is reevaluated automatically by Packaging.

Award Disbursement Detail

*Sequence: Item Type: 9000000000304 Net Award Amount: \$2,522.00

Disbursement Plan: AT *Split Code: ☐ Custom Split ☐ Custom Loan Fee

Disbursement Distribution											
Disb ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disb Balance	Disbursed
01	0530	Academic	U1	1,313.00	0.00	52.00	0.00	52.00	0.00	1,261.00	0.00
02	0540	Academic	U1	1,312.00	0.00	51.00	0.00	51.00	0.00	1,261.00	0.00
03	0545	Non Std	U1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Award Disbursement Detail page

Student Aid Package | Need Summary | Term Summary

Masters, Matt G ID: FAPK0133

Aid Year: 2005 Financial Aid Year 2004-2005 Institution: PSUNV

Career: Undergrad

Packaging Plan ID: Aggregate Source: [Award Notification](#)

Award Period: Package Status:

Award		Status							
*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10	<input type="checkbox"/>	UGRD	9000000000006	Honors Scholarship	5,000.00	0.00	AT	08	Disbursement <input type="button" value="+"/>
20	<input type="checkbox"/>	UGRD	9000000000304	Sub Staff - Sem	2,625.00	0.00	AT	09	Disbursement <input type="button" value="+"/>

Student Aid Package page

Awarding Conditional Aid for Multiple Award Periods

This section clarifies the behavior of conditional awards during multiple award period processing. An important factor in determining how Packaging treats conditional awards is whether federal aid is present in the same award period as the conditional awards. The behavior of conditional awards reverting from "no effect" to "special need" based on the presence of federal aid does not span award periods. Therefore, the presence of federal aid in one award period does not affect the awarding of conditional aid in the subsequent award period. This only applies to sequential award period processing and not simultaneous award period processing. The following tables demonstrate that the behavior of conditional aid is determined on an award period basis.

Note. When conditional awards behave like no-effect awards, it is in the sense that the awards are not restricted by the student's need. However, conditional awards are displayed under the Special Need/Cost Aid fields on the Need Summary page.

Example A:

AAP		NSAP	
<i>Item Type</i>	<i>Behavior</i>	<i>Item Type</i>	<i>Behavior</i>
Conditional Aid 1	No Effect	Conditional Aid 3	No Effect
Federal Aid 1		Federal Aid 2	
Conditional Aid 2	Special Need/Cost	Conditional Aid 4	Special Need/Cost

Example B

AAP		NSAP	
<i>Item Type</i>	<i>Behavior</i>	<i>Item Type</i>	<i>Behavior</i>
Federal Aid 1		Conditional Aid 1	No Effect

Example C

NSAP		AAP	
<i>Item Type</i>	<i>Behavior</i>	<i>Item Type</i>	<i>Behavior</i>
Federal Aid 1		Conditional Aid 1	No Effect
		Federal Aid 2	
		Conditional Aid 2	Special Need/Cost

Example D

NSAP		AAP	
<i>Item Type</i>	<i>Behavior</i>	<i>Item Type</i>	<i>Behavior</i>
Conditional Aid 1	No Effect	Federal Aid 1	
		Conditional Aid 2	Special Need/Cost

NSAP		AAP	
		Federal Aid 2	

If federal aid does not have disbursements scheduled in the same award period as the conditional award, the student's remaining need does not restrict the amount of the conditional award. The student's need does not restrict the conditional award amount because the federal aid is being processed as a passive award, and therefore does not affect calculations for the active award period. For example, a student's award package includes a subsidized Stafford loan for 3,000.00 USD—with disbursements of 1,500.00 USD in the fall and spring semesters—and a conditional University Grant for 1,000.00 USD with a disbursement in the trailing summer term. Because the Stafford loan does not have disbursements in the NSAP, Packaging processes the Stafford loan as a passive award leaving it untouched when it processes the University Grant. Therefore, the University Grant behaves as a *no effect* award because the Stafford loan is not present in the NSAP.

When federal aid has disbursements in the same award period as the conditional award, and the federal aid precedes the conditional award, Packaging treats the conditional award as a special need/cost item type. Consequently, the placement of the conditional award relative to existing federal aid affects the student's conditional award amount. If the conditional award precedes federal aid, Packaging treats the conditional award as a "no effect" award and increases the student's total aid amount without regard for need or COA limits. If the conditional award follows federal aid, Packaging treats it as a special need/cost item type, first determining if unmet need exists to award. If so, Packaging compares the remaining unmet COA against the EFC and awards up to the lesser of the two.

When you use sequential award period processing, you can change the sequence of the conditional award from one award period to the next. The behavior of the conditional award can be different from one award period to the next based on the presence or absence of federal aid. If the NSAP does not have federal aid, but the AAP does, you can decide whether the conditional award behaves as a "no effect" award in both award periods. If you have the conditional award precede federal aid in the AAP, the conditional award behaves as a "no effect" award in both award periods. Or you can choose to have the conditional award follow federal aid in the AAP, so that the conditional award behaves as a special need/cost item type in the AAP and as a "no effect" award in the NSAP. You cannot do this if you use simultaneous award period processing because only one instance of the conditional award exists, and, therefore, only one sequence number for that award.

Important! Using sequential award period processing to change the behavior of conditional awards from one award period to the next is only possible when you use Auto and Mass Packaging. If you use Manual Packaging when you process the student for the second award period, all awards—existing and offered—are evaluated as they are in simultaneous award period processing.

Distributing Awards When a Shortage of Need Exists in One Award Period

To further enhance simultaneous award period processing, Packaging handles a shortage of need in one award period by proportionally redistributing the remainder of the award into the other award period.

For example, you have a student who attending your quarter-based institution for the AAP as well as the trailing summer non-standard term. The student's COA, EFC, and need are given in the following table:

	<i>Academic Award Period</i>	<i>Non-Standard Award Period</i>	<i>Combined</i>
COA (USD)	25,000.00	3,200.00	28,200.00
EFC (USD)	11,000.00	3,000.00	14,000.00
Need (USD)	14,000.00	200.00	14,200.00

The first award in the student's award package is a 4,000.00 USD University Grant that has a disbursement plan that spans both award periods and a split code that distributes the award among all four terms evenly (25 percent fall, 25 percent winter, 25 percent spring, and 25 percent summer). Based on this disbursement split code, the student should receive 3,000.00 USD in the AAP—1,000.00 USD per quarter—and 1,000.00 USD during the NSAP. Because the 1,000.00 USD in the NSAP exceeds the student's 200.00 USD need, Packaging distributes the remaining 800.00 USD (1,000.00 USD minus 200.00 USD) among the three terms in the AAP provided sufficient AAP need remains. This is based on the relative weighting of the original disbursement percentages that pertain to the AAP portion of the disbursement plan/split code pattern. Packaging determines the relative weighting for each term by dividing the original disbursement percentage of the term, 25 percent, by the sum of all disbursement percentages for terms within the award period, 75 percent. For this example, Packaging does the following calculations:

Remainder Calculation for Fall Quarter = $25 / (25 + 25 + 25) * 800.00 = 266.66$

Remainder Calculation for Winter Quarter = $25 / (25 + 25 + 25) * 800.00 = 266.66$

Remainder Calculation for Spring Quarter = $800.00 - 266.66 - 266.66 = 266.68$

Total Disbursement for Fall Quarter = $266.66 + 1,000.00 = 1,266.66$

Total Disbursement for Winter Quarter = $266.66 + 1,000.00 = 1,266.66$

Total Disbursement for Spring Quarter = $266.68 + 1,000.00 = 1,266.68$

Note. When calculating the relative weight of a disbursement percentage, the system is precise to the seventh position beyond the decimal point. This precise figure is multiplied by the remainder, and then rounded using the Rounding Option set up for the financial aid item type.

The following table shows the projected disbursements prescribed by the split code and the projected disbursements that are based on relative weighting:

<i>Disbursement Based on:</i>	<i>Fall Quarter (in USD)</i>	<i>Winter Quarter (in USD)</i>	<i>Spring Quarter (in USD)</i>	<i>Summer Term (in USD)</i>
Prescribed Disbursement Split Percent	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)	1,000.00 (25% x 4,000.00)

<i>Disbursement Based on:</i>	<i>Fall Quarter (in USD)</i>	<i>Winter Quarter (in USD)</i>	<i>Spring Quarter (in USD)</i>	<i>Summer Term (in USD)</i>
Relative Weighting to Account for Need	1,266.66 (25/75 x 4,000.00)	1,266.66 (25/75 x 4,000.00)	1,266.68 (25/75 x 4,000.00)	200.00 (Need)

This relative weighting functionality enables you to continue to award students until their remaining need is exhausted while maintaining a proportional disbursement spread similar to each award's original disbursement percentages.

When Packaging distributes the award proportionally because of a shortage of need, it returns one of the following messages.

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation</i>
9155	FM disbursements recalculated; award period need less than projected.	The award has been recalculated because a portion of the award exceeds FM Need for that award period. This is the message that appears for Need-based aid.
9156	FM disbursements recalculated; award period cost less than projected.	The award has been recalculated because a portion of the award exceeds FM cost for that award period. This is the message that appears for Cost-based aid.
9157	FM disbursements recalculated; award period special need/cost less than projected.	The award has been recalculated because a portion of the award exceeds FM Special Need/Cost for that award period. This is the message that appears for Special Need/Cost financial aid item types.
9158	IM disbursements recalculated; award period need less than projected.	The award has been recalculated because a portion of the award exceeds IM Need for that award period. This is the message that appears for Need-based aid.
9159	IM disbursements recalculated; award period cost less than projected.	The award has been recalculated because a portion of the award exceeds IM cost for that award period. This is the message that appears for Cost-based aid.

<i>Message Number</i>	<i>Message Text</i>	<i>Explanation</i>
9160	IM disbursements recalculated; award period special need/cost less than projected.	The award has been recalculated because a portion of the award exceeds IM Special Need/Cost for that award period. This is the message that appears for Special Need/Cost financial aid item types.

Protecting Disbursements During Awarding

This section provides an overview of disbursement protection and provides examples of:

- Disbursement protection for fully disbursed terms.
- Even across disbursements by term with disbursement protection turned off.
- Even across disbursements by term with disbursement protection turned on.
- Even among first disbursement by term with disbursement protection turned off.
- Even among first disbursement by term with disbursement protection turned on.

Understanding Disbursement Protection

Packaging contains functionality that enables you to choose whether you want disbursed amounts to be protected when repackaging a student. When you activate disbursement protection, Packaging does not repackage an award below what has already been disbursed. To invoke disbursement protection, the award must meet four conditions:

1. The award is for a non-Direct Loan financial aid item type.
2. You indicate at the financial aid item type level—using the Disbursement Protection check box—that Packaging should protect the disbursed portion of an award.
3. The award's disbursement split code uses an even split option of either *Even among first disbursements by term* or *Even across disbursements by term*.

If you do not use a split code with an even split option, the system does *not* observe disbursement protection. Instead, Packaging honors the split percentages defined by the specific financial aid item type and splits the award amount accordingly, which may result in one or more unequal disbursements.

4. The award has one or more disbursed entries.

When disbursement protection is activated, the award cannot fall below the disbursed amount; however, you can still manually un-disburse the award if you feel a student is no longer eligible for the award.

When you modify a disbursement-protected award, Packaging recalculates the total disbursement amount for each term, using the entire new award amount (rather than the residual or difference between the original award and the revised award). This value is referred to as the *term target amount*. After the term target amount is determined, Packaging evaluates the even split option to determine how to split the award within the term. If disbursed amounts exist, Packaging checks to see if the disbursements are greater or less than the term target amount. If the disbursements are less than the term target amount, Packaging distributes to the term target amount while protecting the existing disbursed amounts. If the disbursed amount is greater than the term target amount, Packaging distributes the residual amount—total award amount less the disbursed amount—to the next term while protecting the existing disbursed amounts. Packaging then determines whether subsequent terms are partially disbursed or fully disbursed. If the term is partially disbursed, then the term target amount drives that term's distribution. If the term is fully undisbursed, then Packaging distributes residual amounts from fully disbursed terms into undisbursed terms.

If all disbursement IDs for the designated award period—determined by the packaging plan or the Award Period field on the award entry pages—are fully disbursed, then Packaging adds the residual amount to the last disbursement ID of the award period. If the designated award period is Both, Packaging adds the entire residual amount to the last disbursement ID of the second award period if the student's need for that award period is equal to or greater than the residual amount. If the student's need for the second award period is less than the residual amount, Packaging adds the amount of the student's need to the last disbursement ID of the second award period. It then adds the remainder of the residual amount to the last disbursement ID of the first award period. The following section provides examples of disbursement protection behavior when all of the designated award period's disbursement IDs are fully disbursed.

The even split option you choose—*Even among first disbursements by term* or *Even across disbursements by term*—and whether you have selected the Disbursement Protection check box affects how Packaging distributes the disbursements after an award increase or award decrease. The examples in the following sections demonstrate the possible combinations of even split options with disbursement protection turned on or off.

You cannot manually set the award amount to zero with an award action of *B—Offer/Accept* and have the Validation process return the maximum eligible award amount for a disbursement protected award. If you enter zero as the award amount, the Validation process returns the award with its original award amount and schedules disbursement valuation without making any changes. If you want the award amount to be zero (eliminate the award), then you must manually cancel the award by using the award action of *Cancel*.

In Auto and Mass Packaging, you cannot effectively reduce a disbursement-protected award to a desired amount because the award is generated by the packaging plan rather than you being able to enter a specific amount. Packaging first cancels existing awards that are not locked and do not have disbursed amounts. If a portion of the award has been disbursed, then Packaging reduces the award to the disbursed amount. For example, if, from an award of 1,000.00 USD, 500.00 USD has been disbursed and a rule exists to repackage the student, the system reduces the award to 500.00 USD. Packaging then creates new instances for the awards contained in the packaging plan. Packaging processes the second instance of the same financial aid item type independently of the first instance, and the award amount for this instance uses the aggregate, item type, and fiscal limits of that packaging rule to determine its maximum eligibility. However, the amount that has already been disbursed—preserved in the first instance—is added to the total award amount from the second instance. Continuing the previously given example, the student receives the 500.00 USD plus whatever additional award Packaging determines the student is eligible for. Therefore, it is impossible make a reduction when you repackage the student using Auto or Mass Packaging.

For example, a student has a 3,000 USD University Loan that has disbursement protection activated, with a disbursement plan (ID 15) that covers the institution's two semesters and uses an even split option of *Even among first disbursements by term*. The student also has a 1,000.00 USD Honors Scholarship that does not have disbursement protection activated, with the same disbursement plan as the University Loan but a split code—02—that distributes the award entirely in the first disbursement ID of the spring semester. You have already disbursed the fall disbursement ID to the student. The following table shows the scheduled disbursements. Disbursed amounts are in bold, and all amounts are in USD:

Seq	FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb ID 01 (fall)	Disb ID 02 (spring)
10	University Loan	15	01	Accepted	3,000.00	1,500.00	1,500.00
20	Honors Scholarship	15	02	Accepted	1,000.00	0.00	1,000.00

Then the student's need changes and you attempt to decrease the University Loan to 2,000.00 USD using Auto or Mass Packaging. The first step Packaging takes is to attempt to cancel all existing awards that are not locked. Neither existing award is locked; however, Packaging does not cancel the University Loan because a portion of the award has been disbursed and disbursement protection is activated. Packaging decreases the amount of the award to match the disbursed amount, and cancels the Honors Scholarship. Then Packaging inserts a new instance of the University Loan with an amount of 2,000.00 USD.

Seq	FA Item Type	Disb Plan	Split Code	Action	Award Amount	Disb ID 01 (fall)	Disb ID 02 (spring)
10	University Loan	15	01	Accepted	1,500.00	1,500.00	0.00
20	Honors Scholarship	15	02	Cancelled	0.00	0.00	0.00
30	University Loan	15	01	Offer/Accept	2,000.00	1,000.00	1,000.00

Because Packaging preserves the first instance of the University Loan—for the disbursed portion of the award—due to disbursement protection, as well as adding the second instance of the University Loan, the total award amount for the University Loan is increased to 3,500.00 USD (2,500.00 USD in the fall and 1,000.00 USD in the spring) instead of reduced to 2,000.00 USD. Additional examples of Auto and Mass Packaging behavior during award increases and decreases are in the following sections.

Note. You do not have to process multiple award periods to invoke disbursement protection. It works whether you are processing multiple award periods or processing awards only for a single award period.

See Also

Chapter 33, "Managing Special Cases in Packaging," Processing Direct Loan Adjustments, page 1142

Illustrating Disbursement Protection for Fully Disbursed Terms

The following examples illustrate the behavior of disbursement protection when you have fully disbursed all disbursement IDs within a designated award period.

Note. The behavior of disbursement protection for fully disbursed terms is the same for both even split options, *Even across Disbursements by term* and *Even among first disbursements by term*.

Single Award Period

In this example, the even split option is *Even among first disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs per term and a trailing summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,000.00 USD, the term target amount is 500.00 USD, and the designated award period is *Academic*. The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the AAP.

1,000.00 USD (Original Amount)						
	Fall		Spring		Summer	
Term Target Amount	500.00 USD		500.00 USD		0.00 USD	
Scheduled Amount (Disbursement ID)	500.00 D 01	0.00 D 02	500.00 D 03	0.00 D 04	0.00 D 05	0.00 D 06
Disbursed Amount	250.00	250.00	250.00	250.00	0	0

After fully disbursing the award, you increase the award from the original award amount of 1,000.00 USD to 2,500.00 USD. Packaging takes the residual amount (1,500.00 USD) and adds it to the last disbursement ID of the designated award period (D 04). The new total amount for D 04 is 1,750.00 USD (250.00 USD + 1,500.00 USD).

2,500.00 USD (Increased Amount)						
	Fall		Spring		Summer	
Previously Disbursed Amount (Disbursement ID)	250.00 D 01	250.00 D 02	250.00 D 03	250.00 D 04	0.00 D 05	0.00 D 06
New Amount	250.00	250.00	250.00	1,750.00	0	0

Both Award Period (Sufficient Need in Second Award Period)

In this example, the even split option is *Even among first disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs per term and a leading summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,000.00 USD, the term target amount is 333.33 USD, and the designated award period is *Both*. The student's remaining need for the NSAP is 1,000.00 USD and for the AAP is 5,000.00 USD. The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the both the Non-Standard and AAPs.

1,000.00 USD (Original Amount)						
	Summer		Fall		Spring	
Term Target Amount	333.33 USD		333.33 USD		333.34 USD	
Scheduled Amount (Disbursement ID)	333.33 D 01	0.00 D 02	333.33 D 03	0.00 D 04	333.34 D 05	0.00 D 06
Disbursed Amount	133.33	200.00	133.33	200.00	133.34	200.00

After fully disbursing the award, you increase the award from the original award amount of 1,000.00 USD to 2,500.00 USD. Packaging takes the residual amount (1,500.00 USD) and adds it to the last disbursement ID of the second award period (D 06). The new total amount for D 06 is 1,700.00 USD (200.00 USD + 1,500.00 USD), which is less than the remaining need for the AAP.

2,500.00 USD (Increased Amount)						
	Summer		Fall		Spring	
Previously Disbursed Amount (Disbursement ID)	133.33 D 01	200.00 D 02	133.33 D 03	200.00 D 04	133.33 D 05	200.00 D 06
New Amount	133.33	200.00	133.33	200.00	133.34	1,700.00

Both Award Period (Insufficient Need in Second Award Period)

In this example, the even split option is *Even across disbursements by term* with disbursement protection turned on for a semester-based institution with two disbursement IDs per term and a trailing summer. The tables display the distribution of an original award amount and then an example of how the system distributes an increase to an award.

The original award amount is 1,500.00 USD, the term target amount is 500.00 USD, and the designated award period is *Both*. The student's remaining need for the AAP is 5,000.00 USD and for the NSAP is 1,000.00 USD. The full 1,000.00 USD has already been disbursed using all the disbursement IDs for the both the Non-Standard and AAPs.

1,500.00 USD (Original Amount)						
	Fall		Spring		Summer	
Term Target Amount	500.00 USD		500.00 USD		500.00 USD	
Scheduled Amount (Disbursement ID)	250.00 D 01	250.00 D 02	250.00 D 03	250.00 D 04	250.00 D 05	250.00 D 06
Disbursed Amount	250.00	250.00	250.00	250.00	250.00	250.00

After fully disbursing the award, you increase the award from the original award amount of 1,500.00 USD to 3,000.00 USD. When Packaging takes the residual amount (1,500.00 USD) and attempts to add it to the last disbursement ID of the second award period (D 06), the disbursements for the NSAP exceed remaining need. Then Packaging determines the difference between the existing disbursement amounts (500.00 USD) and the remaining need (1,000.00 USD), and adds this amount (500.00 USD) to D 06. The new amount for D 06 is 750.00 USD (250.00 USD + 500.00 USD). Packaging adds the rest of the residual amount (1,000.00 USD) to the last disbursement ID of the first award period, D 04. The new amount for D 04 is 1,250.00 USD.

3,000.00 USD (Increased Amount)						
	Fall		Spring		Summer	
Previously Disbursed Amount (Disbursement ID)	250.00 D 01	250.00 D 02	250.00 D 03	250.00 D 04	250.00 D 05	250.00 D 06
New Amount	250.00	250.00	250.00	1,250.00	250.00	750.00

Illustrating Even Across Disbursements by Term with Disbursement Protection Turned Off

The following illustrates an example of the even split option, *Even Across Disbursements by Term* with disbursement protection turned off for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then an example of how the system distributes a decrease to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and 500.00 USD has already been disbursed in the disbursement ID 01.

3,000.00 USD (Original Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount (Disbursement ID)	500.00 D 01	500.00 D 02	500.00 D 03	500.00 D 04	500.00 D 05	500.00 D 06
Disbursed Amount	500.00	0	0	0	0	0

After the first disbursement for fall term, you reduce the award from the original award amount of 3,000.00 USD to 2,700.00 USD. The term target becomes 900.00 USD. The student already received 500.00 USD, but with disbursement protection turned off, the system recalculates the remaining disbursements to be 450.00 USD with a disbursement adjustment of 50.00 USD. When you run Authorization/Disbursement, the system adjusts the disbursement by 50.00 USD.

2,700.00 USD (Decreased Amount)						
	Fall		Winter		Spring	
Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Scheduled Amount (Disbursement ID)	450.00 D 01	450.00 D 02	450.00 D 03	450.00 D 04	450.00 D 05	450.00 D 06
Disbursed Amount	450.00	0	0	0	0	0

Illustrating Even Across Disbursements by Term with Disbursement Protection Turned On

The following illustrates an example of the even split option, *Even Across Disbursements by Term* with disbursement protection turned on for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then examples of how the system distributes decreases and increases to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and 500.00 USD has already been disbursed.

3,000.00 USD (Original Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount (Disbursement ID)	500.00 D 01	500.00 D 02	500.00 D 03	500.00 D 04	500.00 D 05	500.00 D 06
Disbursed Amount	500.00	0	0	0	0	0

After disbursing disbursement ID 01 for fall term, you reduce the award from the original award amount of 3,000.00 USD to 2,700.00 USD. The term target becomes 900.00 USD. The following table shows how the system recalculates the disbursement for disbursement ID 02 to be the difference between the term target amount and what has already been disbursed for the fall term. The next disbursement ID for winter is also shown:

2,700.00 USD (Decreased Amount)						
	Fall		Winter		Spring	
Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Scheduled Amount (Disbursement ID)	500.00 D 01	400.00 D 02	450.00 D 03	450.00 D 04	450.00 D 05	450.00 D 06
Disbursed Amount	500.00	400.00	450.00	0	0	0

After disbursing disbursement ID 03 for winter term, you increase the award to 4,500.00 USD. The term target amount becomes 1,500.00 USD. The system first calculates a new term target amount of 1,500.00 USD per term. Because disbursement protection is turned on, the disbursements that occurred in ID 01, ID 02, and ID 03 remain protected. Also, because the fall term is fully disbursed for 900.00 USD, the term target amount of 1,500.00 USD cannot be met. As a result, this creates residual amount of 600.00 USD. This 600.00 USD residual is distributed among any subsequent fully undisbursed terms.

Because the winter term is a partially disbursed term where the existing disbursed amount is less than the term target amount, the system subtracts what has been disbursed (450.00 USD) from the term target amount (1,500.00 USD) and distributes the difference (1,050.00 USD) to the remaining undisbursed ID in the winter term.

Finally, moving to the spring term, because it's a fully undisbursed term, the system adds any residual amount from any fully disbursed previous terms (600.00 USD in this case) to the spring term target amount (1,500.00 USD) totaling 2,100.00 USD. The system then spreads this new term target amount evenly among all undisbursed IDs in the spring term.

4,500.00 USD (Increased Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,500.00 USD		1,500.00 USD		1,500.00 USD	
Scheduled Amount (Disbursement ID)	500.00 D 01	400.00 D 02	450.00 D 03	1,050.00 D 04	1,050.00 D 05	1,050.00 D 06
Disbursed Amount	500.00	400.00	450.00	0	0	0

Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned Off

The following illustrates an example of the even split option, *Even Among First Disbursement for Term* with disbursement protection turned off for a quarter-based institution with two disbursement IDs per term. The tables display the distribution of an original award amount and then an example of how the system distributes a decrease to an award.

The original award amount is 3,000.00 USD, the term target is 1,000.00 USD, and the first disbursement has been disbursed.

3,000.00 USD (Original Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount (Disbursement ID)	1,000.00 D 01	0 D 02	1,000.00 D 03	0 D 04	1,000.00 D 05	0 D 06
Disbursed Amount	1,000.00	0	0	0	0	0

If you reduce the award to 2,700.00 USD, the term target amount becomes 900.00 USD. Because disbursement protection is turned off, the originally scheduled disbursement amount is recalculated to the term target amount of 900.00 USD with a disbursement adjustment of 100.00 USD. When you run the authorization and disbursement processes, the system adjusts the disbursement by 100.00 USD.

2,700.00 USD (Decreased Amount)						
	Fall		Winter		Spring	
Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Scheduled Amount (Disbursement ID)	900.00 D 01	0 D 02	900.00 D 03	0 D 04	900.00 D 05	0 D 06
Disbursed Amount	900.00	0	900.00	0	900.00	0

Illustrating Even Among First Disbursement for Term with Disbursement Protection Turned On

The following illustrates an example of the even split option, *Even Among First Disbursements for Term* with disbursement protection turned on. The tables display the distribution of an original award amount and then examples of how the system distributes increases and decreases to an award.

The original award amount is 3,000.00 USD, the term target amount is 1,000.00 USD, and the disbursement ID 01 of 1,000.00 USD has already been disbursed:

3,000.00 USD (Original Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,000.00 USD		1,000.00 USD		1,000.00 USD	
Scheduled Amount (Disbursement ID)	1,000.00 D 01	0 D 02	1,000.00 D 03	0 D 04	1,000.00 D 05	0 D 06
Disbursed Amount	1,000.00	0	0	0	0	0

After disbursement ID 01 for fall term, you increase the award to 4,500.00 USD. The term target amount becomes 1,500.00 USD. The system determines the amount that the student receives in the remaining disbursements by awarding additional amounts up to the term target for the first term. In this case, 1,000.00 USD has already been disbursed for disbursement ID 01. The system schedules a 500.00 USD disbursement in disbursement ID 02 of the fall term. The fall disbursements now meet the term target amount. The remaining winter and spring terms are fully undisbursed with no residual overflow created in the fall term. Therefore, the system observes the term target amount of 1,500.00 USD.

4,500.00 USD (Increased Amount)						
	Fall		Winter		Spring	
Term Target Amount	1,500.00 USD		1,500.00 USD		1,500.00 USD	
Scheduled Amount (Disbursement ID)	1,000.00 D 01	500.00 D 02	1,500.00 D 03	0 D 04	1,500.00 D 05	0 D 06

4,500.00 USD (Increased Amount)						
Disbursed Amount	1,000.00	500.00	0	0	0	0

After the disbursements for fall term, you reduce the award to 2,700.00 USD. The term target becomes 900.00 USD. The student has already received 1,500.00 USD for the fall term. This creates a shortage of 600.00 USD. The following table displays how the system recalculates the scheduled amounts for the terms. The system deducts the already disbursed amount of 1,500.00 USD from the new award amount of 2,700.00 USD leaving a difference of 1,200.00 USD. Because the winter and spring terms are fully undisbursed, the system splits the 1,200.00 USD difference evenly among both terms creating a new term target amount of 600.00 USD. Because the even split option is even among first disbursement for the term, only the first disbursement ID for each remaining term contains 600.00 USD.

2,700.00 USD (Decreased Amount)						
	Fall		Winter		Spring	
Original Term Target Amount	900.00 USD		900.00 USD		900.00 USD	
Modified Term Target Amt. Due to Disbursed Monies	1,500.00 USD		600.00 USD		600.00 USD	
Scheduled Amount (Disbursement ID)	1,000.00 D 01	500.00 D 02	600.00 D 03	0 D 04	600.00 D 05	0 D 06
Disbursed Amount	1,000.00	500.00	0	0	0	0

Reviewing One-Term DL Loan Functionality

This section provides an overview of one-term DL loan functionality and discusses how to:

- Define a single-term loan.
- Award a single-term loan after the midpoint.
- Associate rules with one-term DL processing.
- Review disbursement ID scenarios.

Understanding One-Term DL Loan Functionality

Federal regulations require that a single term loan be split into at least two disbursements. The one-term option is designed for schools using direct loan MPN processing. This functionality is also available for those non-DL item types that have the disbursement protection flag activated.

If the loan period consists of only one semester, the first half of the loan is disbursed at the beginning of the semester. The second half is disbursed at the calendar midpoint of the semester. For any loan period, if more than half of the loan period has elapsed before an initial disbursement has been made, a single disbursement of the entire loan may be made. After an initial disbursement is authorized and disbursed, you can repackage (increase or decrease) the award in the same manner as is currently in place for multi-item DL awards.

Page Used to Define a Single-Term Loan

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disbursement Split Formula	DISB_ID_SPLIT	Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula	Define split code formulas or disbursement percentages for the split codes you created based on the disbursement split code descriptions. This setup provides the specific percentage distribution to each disbursement ID created within a disbursement plan.

Defining a Single-Term DL Loan

Access the Disbursement Split Formula page (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula, Disbursement Split Formula).

Disbursement Split Formula					
Copy					
Institution:	PSUNV PeopleSoft University				
Aid Year:	2006	Financial Aid Year 2005-2006		Disbursement Plan:	OD One Term - 3 Disbs
Career:	UGRD	Undergraduate		Split Code:	01 One Term -- 3 Disbs
Even Split Option:	Even across disbs for One Term			Total Disbursement:	100.00
Disbursement Split Percentages					
Disbursement ID	Description	Term	Disbursement Date	Percentage	Midpoint
01	One Term -- JAN	0560	01/13/2006	0.00	<input type="checkbox"/>
02	One Term -- MAR	0560	03/13/2006	0.00	<input checked="" type="checkbox"/>
03	One Term -- MAY	0560	05/13/2006	0.00	<input type="checkbox"/>

Disbursement Split Formula page

Setup is defined for a single term and must contain two or more disbursement IDs, each containing a unique disbursement date. In addition, the disbursement date for the designated midpoint disbursement ID must be after the midpoint of the term.

Even Split Option Select the value, *"Even across disbs for One Term"* to define the new split code for a single term loan.

Midpoint Select to identify the midpoint date.

Note. To facilitate increases and change processing for Stafford one term direct loan MPN item types, you should set up and define at least four disbursement IDs. You can define up to a maximum of twenty disbursements for a single term.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Split Code Formulas, page 90

Awarding a Single-Term Loan After the Midpoint

If a single term loan is awarded after the midpoint of the term, you have the option to disburse the entire award amount in a single installment. If you pay the student this way, you do not need to use the *Even Across Disbursements for One Term* disbursement plan option. You can create a disbursement plan with disbursement dates on or after the midpoint and use the existing *Even Among First Disb for Term* option that places the entire disbursement in the first disbursement ID of each term.

Associating Rules with One-Term DL Processing

One-term DL loan processing treatment is identical to the one-term non-DL item type with disbursement protection invoked. If you decrease the loan and all disbursement IDs have been disbursed, the system decreases the award starting with the last disbursement ID and works its way up toward the first ID. Also, if you increase the loan and all of the disbursement IDs have been disbursed, then you must use a different item type to make the increased award.

Reviewing Disbursement ID Scenarios

To compare and illustrate the behavior of one-term DL loan processing versus a non-DL award with disbursement protection invoked versus a non-DL item type with disbursement protection turned, review the following examples.

Note. Although the following examples show a two disbursement plan for direct loan item types and disbursement plans, we are recommending that you create plans with a minimum of four disbursement IDs. This facilitates change increases made to the award after the first disbursement has been made.

Student with a DL Item Type

In the following example, a student is awarded a DL item type with a Disb Plan/Split Code (even split for single term) with two IDs.

Disb Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1 Disb Plan/Split Code: OT 2,000.00 USD on 08/01/2005

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	0.00
Disb 02	500.00 USD	0.00

2. Originate and disburse ID 01 for 500.00 USD on 09/05/2005

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because Disb 01 is disbursed, the residual increase in the award amount goes toward the midpoint disbursement ID (Disb 02).

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	1,000.00 USD	0.00

4. Originate and disburse ID 02 for 1,000.00 USD on 10/20/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	1,000.00	1,000.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. The system repackages and adjusts Disb 02 downward from 1,000.00 USD to 400.00 USD to total the 900.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	1,000.00 USD

6. You must run DL origination as well as authorization/disbursement to reverse the 600.00 USD adjustment so that it reflects the revised Disb 02 ID amount of 400.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	400.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because all of the split IDs have been fully disbursed, you should get an award message requesting that you use another item type for the increase.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	400.00 USD

8. Decrease the award to 800.00 on 11/15/2005. The system repackages and adjusts Disb 02 ID downward from 400.00 USD to 300.00 USD to total the 800.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	300.00 USD	400.00 USD

9. You must run DL origination and authorization/disbursement to reverse the 100.00 USD adjustment so that it reflects the revised Disb 02 ID amount of 300.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	300.00 USD	300.00 USD

Student with a Non-DL Item Type with Disbursement Protection Turned On

In the following example, a student is awarded a non-DL item type with disbursement protection turned on at the item type level and with a Disb Plan/Split code (Even Split for Single Term) with two IDs.

Disb Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1,000.00 USD on 08/01/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	0.00
Disb 02	500.00 USD	0.00

2. Originate and disburse ID 01 for 500.00 USD on 09/05/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because Disb 01 is disbursed, the residual increase in the award amount goes toward the midpoint disbursement ID (Disb 02).

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	1,000.00 USD	0.00

4. Disburse ID 02 for 1,000.00 USD on 10/20/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	1,000.00 USD	1,000.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. The system repackages and adjusts Disb 02 downward from 1,000.00 USD to 400.00 USD to total the 900.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	1,000.00 USD

6. You must run authorization/disbursement to reverse the 600.00 USD adjustment so that it reflects the revised Disb 02 ID amount of 400.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	400.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because all of the split IDs have been fully disbursed, you should get an award message requesting that you use another item type for the increase.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	400.00 USD	400.00 USD

8. Decrease the award to 800.00 on 11/15/2005. The system repackages and adjusts Disb 02 ID downward from 400.00 USD to 300.00 USD to total the 800.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	300.00 USD	400.00 USD

9. You must run authorization/disbursement to reverse the 100.00 USD adjustment so that it reflects the revised Disb 02 ID amount of 300.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	300.00 USD	300.00 USD

Student with a Non-DL Item Type with Disbursement Protection Turned Off

In the following example, a student is awarded a non-DL item type with disbursement protection turned off at the item type level and with a Disb Plan Split Code (Even Split for Single Term) with two IDs.

Disb Plan/Split Code: OT2

ID 01 09/01/2005

ID 02 11/01/2005 Midpoint

1. Award the student 1,000.00 USD on 08/01/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	0.00
Disb 02	500.00 USD	0.00

2. Disburse ID 01 for 500.00 USD on 09/05/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	500.00 USD	500.00 USD
Disb 02	500.00 USD	0.00

3. Increase the student's award to 1,500.00 USD on 09/10/2005: Because disbursement protection is off, the system recasts the award across all of the disbursement IDs, both disbursed and undisbursed.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	750.00 USD	500.00 USD
Disb 02	750.00 USD	0.00

4. Re-disburse Disb ID 01 for the residual 250.00 USD and disburse Disb ID 02 for 750.00 USD on 10/20/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	750.00 USD	750.00 USD
Disb 02	750.00 USD	750.00 USD

5. Decrease the student's award to 900.00 USD on 10/25/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disb 01 ID downward from 750.00 USD to 450.00 USD and adjusting Disb 02 ID downward from 750.00 USD to 450.00 USD to total the 900.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	450.00 USD	750.00 USD
Disb 02	450.00 USD	750.00 USD

6. You must run authorization/disbursement to reverse the 300.00 USD adjustments each from Disb ID 01 and Disb ID 02 (totaling the 600.00 USD decrease) so that it reflects the revised Disb 01 ID amount of 450.00 USD and Disb 02 ID amount of 450.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	450.00 USD	450.00 USD
Disb 02	450.00 USD	450.00 USD

7. Increase the award to 1,100.00 USD on 11/10/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disb 01 ID upward from 450.00 USD to 550.00 USD and adjusting Disb 02 ID upward from 450.00 USD to 550.00 to total the 1,100.00 award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	550.00 USD	450.00 USD
Disb 02	550.00 USD	450.00 USD

8. Re-disburse Disb ID 01 for the residual 100.00 USD and Disb ID 02 for 100.00 USD, totaling 550.00 USD each (or 1,100.00 USD total disbursements) on 11/15/2005.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	550.00 USD	550.00 USD
Disb 02	550.00 USD	550.00 USD

9. Decrease the award to 800.00 USD on 11/15/2005. Because disbursement protection is off, the system recasts the award across both disbursement IDs that are disbursed, thereby adjusting Disb 01 ID downward from 550.00 USD to 400.00 USD and adjusting Disb 02 ID downward from 550.00 USD to 400.00 to total the 800.00 USD award.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	400.00 USD	550.00 USD
Disb 02	400.00 USD	550.00 USD

10. You must run authorization/disbursements to reverse the 300.00 USD adjustment so that it reflects the revised Disb 01 ID amount of 400.00 USD and the revised Disb 02 ID amount of 400.00 USD.

<i>Split</i>	<i>Awarded</i>	<i>Disbursed</i>
Disb 01	400.00 USD	400.00 USD
Disb 02	400.00 USD	400.00 USD

Managing Origination from Two-Term Loan to One-Term Loan

Packaging allows for a new disbursement plan option to support DL one-term loans. There are no changes to the Direct Lending process if you choose this new disbursement plan option. However, if you want to change an existing DL loan from a two-term loan to a one-term loan before transmitting the loan, you must first cancel the originated two-term loan using packaging and run DL origination with the adjustment check box selected. Then using packaging, insert a new row, award a new DL item type, use a disbursement plan and split code that reflects the new even split option for one term, and rerun origination with loan adjustments turned on.

See Also

Chapter 33, "Managing Special Cases in Packaging," Reviewing One-Term DL Loan Functionality, page 1189

Chapter 34

Reviewing Awards

This chapter lists common elements and discusses how to:

- Review award activity.
- Review aggregate aid.
- Review student packaging status by date.
- Review award summary information by category.
- Review total award summary information.
- Review anticipated aid.
- Expire anticipated aid.
- Review overaward amounts.

Common Elements Used in This Chapter

Accepted	Displays the award amount accepted by the student.
Authorized	Displays the amount authorized for disbursement to the student.
Disbursed	Displays the amount disbursed to the student.
Disbursement ID	Displays the disbursement ID associated with this award amount.
Disbursement Plan	Displays the disbursement plan associated with the award.
Item Type	Displays the financial aid item type of the award.
Offered	Displays the award amount offered to the student.
* = Expired	An asterisk next to a net award amount indicates that the amount can no longer be applied as anticipated aid because it has expired. These awards no longer show as anticipated aid in PeopleSoft Enterprise Student Financials.

Reviewing Award Activity

As financial aid is packaged, adjusted, and disbursed, all activity associated with those actions is recorded. Use the Award Activity page to review changes to a student's financial aid package.

This section discusses how to review FA Term data.

Pages Used to Review Award Activity

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Award Activity	STDNT_AWRD_ACTV	Financial Aid, Awards, View Award Activity, Award Activity	Review changes to a student's award by financial aid item type.
Award Detail	STDNT_AWD_ACTV_DET	Click the Award Detail link on the Award Activity page.	View more information about the student's award and the action reason, as well as cost of attendance information.
FA Term Data	STDNT_ACTV_TRM_SEC	Click the Term Detail button on the Award Detail page.	Review the FA Term data that is used to award the financial aid item type to the student.

Reviewing FA Term Data

Access the FA Term Data page (click the Term Detail button on the Award Detail page).

Academic Year Displays the academic year associated with the term.

Total Units Displays the total number of units that the student is taking for the term.

Pell Term COA (Pell term cost of attendance) Displays the term-based Pell COA by career.

The other fields on this page are the same as those on the Term Summary page.

See Also

Chapter 28, "Awarding and Packaging Students," Viewing Term Summary Information, page 993

Reviewing Aggregate Aid

This section provides an overview of aggregate aid review and discusses how to:

- Review aggregate aid summary.
- Review aggregate aid by school.
- View aggregate detail.
- Review aggregate program summary.

See Also

Chapter 27, "Preparing for Awarding and Packaging," Managing Aggregate Aid, page 965

Understanding Aggregate Aid Review

The aggregate aid summary components display information regarding defined aggregate area limit amounts, used amounts against the limits, and remaining eligibility. Two aggregate aid summary components are available: View Aggregate Aid and View Aggregate Program Summary . Each is based on aggregate areas that you set up in the system. You can define aggregate area rules for each academic grade level, for undergraduate and graduate designation, or as lifetime funding limits. An aggregate area can be attached to one or many financial aid item types or awards. Information maintained in the aggregate aid tables helps determine a student's annual and lifetime limits during the Awarding and Packaging processes. The aggregate aid summary components are updated by the Awarding and Packaging processes. You can also update individual aggregate data using the Update Incoming Aggregate Aid component.

Another source of aggregate aid history for the federal Stafford subsidized, Stafford unsubsidized, Perkins, Pell, and (Federal) Student Education Opportunity Grant (SEOG) aid programs is maintained within the National Student Loan Data System (NSLDS) database. NSLDS data is loaded into the PeopleSoft system during the Institutional Student Information Records (ISIR) Load routine as well as from Transfer Student Monitoring and Financial Aid History requests. NSLDS data that is loaded into the system can be pushed to the aggregate aid tables to be used during the Awarding and Packaging processes. An aggregate source of NSLDS must be set in the system to direct the Awarding and Packaging processes to use the NSLDS totals instead of the standard aggregate aid totals.

In addition to using aggregates to keep track of federal funds, you can establish aggregate areas and aggregate limits for any other award sources in the system. You should establish aggregate limits for all federal funds, such as Pell, Stafford, and SEOG. If aggregate limits are not established, the Packaging and Awarding processes may award students more than the federally or institutionally established annual and lifetime limits.

Pages Used to Review Aggregate Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Aggregate Summary	STDNT_AGGR_AWDS	Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregate Summary	Review aggregate aid summary for a student.
Aggregates by School	STDNT_AGGR_SCHL	Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregates by School	Review aggregate aid by school. Check whether aggregate aid from a particular institution has been entered or whether the student has received aggregate aid from more than one institution.
Aggregate Detail	AGGR_SCHL_SEC	Click the Detail link on the Aggregates by School page.	View additional details of each institution's aggregate aid award to the student, including loan information.
Aggregate Program Summary	SFA_STU_AGGR_PROG	Financial Aid, Awards, Aggregates, View Aggregate Program Summary, Aggregate Program Summary	View aggregate aid history for a student for a corresponding aggregate program.

Reviewing Aggregate Aid Summary

Access the Aggregate Summary page (Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregate Summary).

Aggregate Summary		Aggregates by School	
Jelena Williams		FAPKPEL0007	
<div>Find First 1 of 2 Last</div>			
Aggregate Area:		PELL	Pell Grant
<div>Lifetime Total Find First 1 of 1 Last</div>			
Aid Year:	2010	Federal Aid Year 2009 - 2010	NSLDS Total: 0.00
	Limit	Used	Remaining
Undergraduate	0.00	4,800.00	0.00
Graduate	0.00	0.00	0.00
Term Count	0	4	
<div>Total % Used: 133.3333</div>			
<div>Level Totals by Aid Year Find First 1 of 1 Last</div>			
Aggregate Level	Limit	Used	Remaining
U1	5,350	4,800.00	550.00
			Cumulative Limit
			Cumulative Used

Aggregate Summary page

Lifetime Total**Aid Year**

Indicates the aid year that corresponds to the displayed information. Use the scroll arrows to view aggregate aid made in other aid years.

NSLDS Total (National Student Loan Data System total)

Indicates the NSLDS total that has been loaded and pushed from the NSLDS tables.

Total % Used

Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.

Undergrad Lifetime (undergraduate lifetime)

Information in this row is for the student's undergraduate NSLDS loan years (U0-U5) and associated awards.

Graduate Lifetime

Information in this row is for the student's graduate NSLDS loan years (G1-G4, P1-P4) and associated awards. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.

(Cumulative): The student's undergraduate amount of this aggregate aid is counted towards the graduate limit.

(Distinct): The undergraduate and graduate limits are tracked separately.

Lifetime Terms	If a limit applies to the number of terms that a student can receive this type of aid, in addition to or separate from a dollar amount limit, this row displays the limit (if any) and the number of terms for which the student has received the award. The Packaging routine does not enforce these lifetime term limits; these fields are for informational purposes only.
Limit	The lifetime maximum aggregate amount (or number of terms) the student can receive for this aggregate area/aid.
Used	The amount of aid or number of terms that the student has received this type of aggregate aid.
Remaining	Indicates unused lifetime aggregate eligibility (amount or terms) that the student can receive.

Level Totals by Aid Year

Aggregate Level	Displays the student's aggregate level for the displayed year. Aggregate level data is posted as a result of Awarding and Packaging processing as well as data entered in the Update Incoming Aggregate Aid component.
Limit	Displays the annual maximum aggregate amount that the student can receive for this aggregate level.
Used	Displays the amount that the student has received.
Remaining	Displays the unused annual aggregate eligibility that the student can receive.
Cumulative Limit	Displays the maximum cumulative amount that the student can receive for this academic level. This is an optional limitation that can be defined on the corresponding aggregate area.
Cumulative Used	Displays the unused cumulative level limit for which the student is eligible.
Dependency	The student's dependency status appears after any awarding or packaging activity has occurred for this aggregate area as of the aid year.
PLUS Override (Parent Loan for Undergraduate Students override)	The student's PLUS override status maintained on the STDNT_AID_PACKAGE component appears for all aggregate areas that correspond to either the Federal Family Educational Loan Program (FFELP) or Direct Loan programs. PLUS Override status appears after any awarding or packaging activity has occurred.

Reviewing Aggregate Aid by School

Access the Aggregates by School page (Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregates by School).

Aggregate Summary

Aggregates by School

Renee Stowitzky

FA0860

Find

First

1 of 1

Last

Aggregate Area: PELL

Pell Grant

Total 11,683.00

Scheduled 11,683.00

Customize

Find

First

1-4 of 4

Last

Aid Year	Status	School Code	Description	Award Amount	Scheduled	Detail
2005	Internal	001315	UNIVERSITY OF CALIFORNIA (UCLA	3750.00	3,750.00	Detail
2004	Internal	001315	UNIVERSITY OF CALIFORNIA (UCLA	3750.00	3,750.00	Detail
2003	Internal	001315	UNIVERSITY OF CALIFORNIA (UCLA	3750.00	3,750.00	Detail
2002	Internal	001315	UNIVERSITY OF CALIFORNIA (UCLA	433.00	433.00	Detail

Aggregates by School page

Information for this page is viewed by aggregate area, such as Stafford or Pell. Use the scroll arrows to view other aggregate areas.

Total Displays the total lifetime amount awarded by all schools for this student for this aggregate area.

Scheduled Displays the aggregate Pell amount award to the student. For non-Pell aggregate areas, this field remains at zero.

Aid Year Displays the aid year in which the aggregate aid was awarded to the student. Use the scroll arrows to view additional aid years.

Status Indicates whether your institution or another institution awarded the aggregate aid. Values are:

Internal: The aggregate aid was awarded by your institution by means of the award entry pages.

Imported: The aggregate aid was awarded at another institution and has been added to the system by means of the Aggregate Aid Data page.

School Code Displays the code and name of the institution where the aggregate aid was awarded.

Award Amount Displays the amount of aggregate aid provided by each school.

Scheduled Displays the aggregate Pell amount award to the student for the corresponding aid year. For non-Pell aggregate areas, this field remains at zero.

Detail Click this link to access the Aggregate Detail page and view detailed information about each school's aggregate aid award.

Viewing Aggregate Detail

Access the Aggregate Detail page (click the Detail link on the Aggregates by School page).

Aggregate Detail			
Aggregate Area:	STAFFORD	Stafford Loan - Subsidized	Aid Year: 2004-2005
School Code:	001315	UNIVERSITY OF CALIFORNIA (UCLA	Academic Year: 2005
Aggregate Level:	U0	Undergraduate Freshman - Never	Status: Internal
Expected Award: 2,625.00		Actual Award: 0.00	
Aggregate Loan Data			
Find View All		First	1 of 1 Last
Loan Application Seq Nbr:	Lender OE Branch:		
Loan Destination Nbr:			
Lender OE Code:			
Loan Type:			
Loan Period Start:	Gross Disbursed Amount:	\$0	
Loan Period End:	Total Loan Fees:	\$0.00	
<input type="checkbox"/> Borrower Based Academic Year	Net Disbursed Amount:	\$0.00	

Aggregate Detail page

The page displays aggregate area, aid year, academic year, school code, and status information about the award from the Aggregates by School page.

Aggregate Level Displays the student's academic level for which he or she received the aggregate amount.

Expected Award Displays the aggregate amount offered to the student.

Actual Award Displays the aggregate amount disbursed to the student.

Aggregate Loan Data

The fields in this group box display loan processing information for loan awards that have at least been originated. However, this functionality is not currently supported, and these fields remain blank.

Reviewing Aggregate Program Summary

Access the Aggregate Program Summary page (Financial Aid, Awards, Aggregates, View Aggregate Program Summary, Aggregate Program Summary).

Aggregate Program Summary

Julia Chinton FAAG0023

Find | View All First 1 of 1 Last

Aggregate Program: FSTF

Find | View All First 1 of 2 Last

Program Totals by Aid Year

Aid Year:	Limit	Used	Remaining
2005			
Undergrad Lifetime	46,000.00	9,000.00	37,000.00
Graduate Lifetime	138,500.00	9,000.00	129,500.00

Aggregate Areas for Program

Find | View All First 1 of 2 Last

Aggregate Area: STAFFORD

Find | View All First 1 of 1 Last

Totals by Aid Year

Aid Year:	Limit	Used	Remaining
2005			
Undergrad Lifetime	23,000.00	0.00	23,000.00
Graduate Lifetime (Cumulative)	65,500.00	0.00	65,500.00

Aggregate Program Summary page

Aggregate program limits link aggregate areas together to enable you to combine limits between aggregate areas. The intent is to support the Stafford program, which comprises the subsidized and unsubsidized programs.

Program Totals by Aid Year

Aid Year	Indicates the aid year that corresponds to the displayed information. Use View All to view aggregate aid that was made in other aid years.
Undergrad Lifetime (undergraduate lifetime)	Information in this row is for the student's combined undergraduate NSLDS loan years (U0–U5) awards that are associated with the aggregate areas that are linked to this aggregate program.
Graduate Lifetime	Information in this row is for the student's combined graduate NSLDS loan years (G1–G4, P1–P4) awards that are associated with the aggregate areas that are linked to this aggregate program. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.

Aggregate Areas for Program

Aggregate Areas for Program	Indicates the aid year that corresponds to the displayed information. Use View All to view aggregate area totals in other aid years.
Undergrad Lifetime (undergraduate lifetime)	Information in this row is for the student's undergraduate NSLDS loan years (U0–U5) and associated awards.
Graduate Lifetime (Cumulative)	<p>Information in this row is for the student's graduate NSLDS loan years (G1–G4, P1–P4) and associated awards. The student's undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.</p> <p>The student's undergraduate amount of this aggregate aid is counted towards the graduate limit. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student cannot receive more than 40,000 for this aggregate area.)</p> <p>When Distinct is displayed, the undergraduate and graduate limits are tracked separately. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student can receive up to 60,000 for this aggregate area.)</p>

Reviewing Student Packaging Status by Date

The student's financial aid award package as well as the information used to award a student can change over time. The As Of Status component enables you to view information about a student's ISIR information and award package by a particular date in time. As new ISIR data is loaded, a student's award package may change. Use the pages in the As Of Status component to review changes over time. This can be particularly important for explaining a reduced award to a student or for reviewing changes to student's awards.

This section discusses how to:

- Review ISIR summary information by date.
- Review award summary by date.


Pages Used to Review Student Packaging Status by Date

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
As of ISIR Summary	AS_OF_ISIR_SUMMARY	Financial Aid, Awards, View by Date, As of ISIR Summary	Review a student's ISIR summary detail as of a particular date, various database matches, and verification status.

Page Name	Definition Name	Navigation	Usage
As of Award Summary	AS_OF_AWRD_SUMMRY	Financial Aid, Awards, View by Date, As of Award Summary	Review award summary. Review a student's financial aid package as of a particular date in time.

Reviewing ISIR Summary Information by Date

Access the As of ISIR Summary page (Financial Aid, Awards, View by Date, As of ISIR Summary).

As of ISIR Summary		As of Award Summary	
Renee Stowitzky		ID:	FA0860
Aid Year:	2004 Financial Aid Year 2003-2004	Institution:	PSUNV
As Of Date:	09/15/2004 		
Effective Date:	02/09/2003	Effective Sequence:	1
Date Application Received:	02/05/2003	INS Match:	
PELL ID:	589-60-0713ST 2	VA Match:	
Dependency Status:	Dependent w/Primary EFC	Verification Selection Ind:	
Federal PELL Eligibility:		Citizenship Status:	
Selective Service Match:		SAR C Flag:	
Selective Service Registration:		SSA Citizenship Indicator:	A U.S. Citiz
SSN:	146731111	INS Verification Number:	
SSN Match:	4 Match		

As of ISIR Summary page

As of Date Enter the date that you want to review related to the student's ISIR information. When you make an entry, the system displays the data that was used for the student as of the entered date.

Effective Sequence Displays the number assigned to each effective-dated row that enables you to keep track of multiple rows with the same effective date.


The other fields on this page correspond to those on the ISIR Information Summary page.

See Also

Chapter 27, "Preparing for Awarding and Packaging," Reviewing the Packaging Status Summary Page, page 941

Reviewing Award Summary by Date

Access the As of Award Summary page (Financial Aid, Awards, View by Date, As of Award Summary).

As of [SIR Summary]		As of Award Summary			
Renee Stowitzky		ID:	FA0860		
Aid Year:	2004	Financial Aid Year	2003-2004		
Institution:	PSUNV				
As Of Date:	09/15/2004 				
Item Type	Career	Offered	Accepted	Authorized	Disbursed
Federal Pell Grant - Quarter	UENG	3,750.00	3,750.00	1,250.00	0.00

As of Award Summary page

This page displays information for the entire aid year. The information on this page comes from the student award information and the authorization and disbursement processes.

As of Date Enter the date that you want to review related to the student's award information. When you make an entry, the system displays information about the student's awards as of the entered date.

Item Type Displays the financial aid item type of the award.

Career Displays the career associated with the award.

Reviewing Award Summary Information by Category

This section discusses how to review award summary information.

Pages Used to Review Award Summary Information by Category

Page Name	Definition Name	Navigation	Usage
Award Category Totals	STDNT_AWRD_CATG	Financial Aid, Awards, View Award Category Summary, Award Category Totals	Review award summary information. View award totals by award category for the entire aid year.
Award Category Detail	STDNT_AWRD_CTG_DET	Click the Award Detail link on the Award Category Totals page.	View information about each award included in a category on the Award Category Totals page.

Reviewing Award Summary Information

Access the Award Category Totals page (Financial Aid, Awards, View Award Category Summary, Award Category Totals).

Award Category Totals						
Renee Stowitzky			ID:	FA0860		
Aid Year: 2004 Financial Aid Year 2003-2004			Institution:	PSUNV		
Category	Award Count	Offer Total	Accept Total	Authorized Total	Disbursed Total	
Grant	1	3,750.00	3,750.00	1,250.00	0.00	Award Detail
Total	1	3,750.00	3,750.00	1,250.00	0.00	

Award Category Totals page

Category	Displays the type of financial aid award. An award's category comes from the Financial Aid Type field on the FA Item Type 1 page. Each category for which the student has an award is shown.
Award Count	Displays the number of awards of this category awarded to the student.
Offer Total	Displays the total award amount offered for this category.
Accept Total	The total award amount accepted for this category.
Authorized Total	Displays the total amount authorized for disbursement to the student for the category.
Disbursed Total	Displays the total amount disbursed to the student for the category.
Award Detail	Click this link to access the Award Category Detail page and view information about each award included in a category.
Total	Displays the total of all categories for each column.

Reviewing Total Award Summary Information

The Award Summary component enables you to review a student's awards for the entire aid year or for a particular term, and also indicates whether each award has been authorized or disbursed.

This section discusses reviewing an annual award summary.

Pages Used to Review Total Award Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Award Summary	STDNT_AWRD_INQUIRY	Financial Aid, Awards, View Term Award Summary, Award Summary	Review an annual award summary. View a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award.
Award Detail	AWARD_DETAIL_SEC	Click the Award Detail link on the Award Summary page.	View the disbursement plan and split code for an individual award, as well as details about a disbursement ID.
Award Term Summary	STDNT_AWRD_TERM	Financial Aid, Awards, View Term Award Summary, Award Term Summary	View a student's awards by term. This is particularly useful when you are viewing awards for different careers for the terms.

Reviewing an Annual Award Summary

Access the Award Summary page (Financial Aid, Awards, View Term Award Summary, Award Summary).

Award Summary		Award Term Summary					
Renee Stowitzky		ID:	FA0860				
Aid Year:	2004 Financial Aid Year 2003-2004	Institution:	PSUNV				
Item Type	Description	Career	Offered	Accepted	Authorized	Disbursed	
900000000370	Pell Grant - Qtr	UENG	3,750.00	3,750.00	1,250.00	0.00	Award Detail
TOTAL			3,750.00	3,750.00	1,250.00	0.00	

Award Summary page

The amounts on this page are for the entire aid year. Authorized and disbursed amounts may not be equal to the accepted amount if you have not disbursed all terms.

Award Detail Click this link to access the Award Detail page and view the disbursement plan and split code for an individual award, as well as details about a disbursement ID.

TOTAL Displays the totals for the student's entire financial aid package.

Reviewing Anticipated Aid

When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.

This section discusses how to:

- Review anticipated aid by term.
- Review anticipated aid by item type.

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Disbursement and Anticipated Aid, page 123](#)

Pages Used to Review Anticipated Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Anticipated Aid by Term	ANTICIPTD_AID_SUMM	Financial Aid, Awards, View Anticipated Aid by Term, Anticipated Aid by Term	Review the anticipated aid for a student by term.
Anticipated Aid by Item Type	ANTICIPATED_AID	Financial Aid, Awards, View Anticipated Aid Item Type, Anticipated Aid by Item Type	Review the anticipated aid for a particular award financial aid item type.

Reviewing Anticipated Aid by Term

Access the Anticipated Aid by Term page (Financial Aid, Awards, View Anticipated Aid by Term, Anticipated Aid by Term).

Anticipated Aid by Term					
Susan Forrester			ID:	FAPK0130	
Aid Year:	2005	Financial Aid Year 2004-2005		Institution:	PSUNV
Term:	0530	2004 Fall			
Activity Find View All First ◀ 1-2 of 2 ▶ Last					
Item Type:	Federal SEOG Grant	Career:	UGRD	Disbursement Plan:	01
Date/Time:	10/15/2004 3:50:25PM			Disbursement ID:	01
	Apply Dt:	10/15/2004	Expire Dt:	11/14/2004	Net Award Amount: 2,000.00
Item Type:	Federal Work-Study Program	Career:	UGRD	Disbursement Plan:	01
Date/Time:	10/15/2004 3:50:25PM			Disbursement ID:	01
	Apply Dt:	10/15/2004	Expire Dt:	11/14/2004	Net Award Amount: 1,000.00
Total Active Anticipated Aid:					3,000.00 * = Expired

Anticipated Aid by Term page

Only financial aid item types that are designated as anticipated aid are displayed on this page. Use the scroll arrows to view additional anticipated aid awards for the term.

Apply Dt (apply date) Displays the date on which the award can be applied to the student's account as anticipated aid. This date is based on the disbursement date of the disbursement ID.

Expire Dt (expire date) Displays the last date that the award is applied as anticipated aid to the student's account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the Anticip Aid Expiration Days (anticipated aid expiration days) field on the FA Item Type 3 page.

Net Award Amount Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.

Total Active Anticipated Aid Displays the total amount of anticipated aid that is still active for the student for the term. This is the sum of the net award amounts for any financial aid item type that has not expired.

Reviewing Anticipated Aid by Item Type

Access the Anticipated Aid by Item Type page (Financial Aid, Awards, View Anticipated Aid Item Type, Anticipated Aid by Item Type).

Anticipated Aid by Item Type

Susan Forrester **ID:** FAPK0130

Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Item Type: 900000000105 Federal SEOG Grant ☐ **Show Active Aid Only**

Find First 1 of 1 Last

Disbursement Plan: 01 Two Semesters **Career:** UGRD

Find | View All First 1 of 2 Last

Disbursement ID: 01 Fall *** = Expired**

Find | View All First 1 of 1 Last

Activity	As of Date/Time	Term	Apply Dt	Expire Dt	Net Award
	10/15/2004 3:50:25PM	0530 2004 Fall	10/15/2004	11/14/2004	2,000.00

Anticipated Aid by Item Type page

Only financial aid item types that are designated as anticipated aid are displayed on this page.

Show Active Aid Only Select this check box to view active anticipated aid awards only. Clear to view all anticipated aid awards (active and expired). When you first access this page, this check box is cleared.

Career Displays the career that is associated with this disbursement plan. If the student is a multicareer student, use the scroll arrows to view other disbursement plan and career combinations for this financial aid item type.

Disbursement ID Displays the individual disbursement ID for this anticipated aid award. The page displays award information by disbursement ID, instead of by term or aid year. Use the scroll arrows to view other disbursement IDs for this financial aid item type.

As of Date/Time Displays the date and time when the anticipated aid was last updated. As changes are made, new rows are added with different dates and times. Use the scroll arrows to view additional changes to this award.

Apply Dt (apply date) Displays the date on which the award can be applied to the student's account as anticipated aid. This date is based on the disbursement date of the disbursement ID.

Expire Dt (expire date) Displays the last date that the award is applied as anticipated aid to the student's account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the Anticip Aid Expiration Days field on the FA Item Type 3 page.

Net Award

Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.

Expiring Anticipated Aid

This section discusses how to expire anticipated aid.

Page Used to Expire Anticipated Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Expire Anticipated Aid	ANTICIPTD_AID_EDIT	Financial Aid, Awards, Award Processing, Expire Anticipated Aid, Expire Anticipated Aid	Expire anticipated aid for any financial aid item type displayed. Also view the student's anticipated aid for a particular term.

Expiring Anticipated Aid

Access the Expire Anticipated Aid page (Financial Aid, Awards, Award Processing, Expire Anticipated Aid, Expire Anticipated Aid).

Expire Anticipated Aid

Susan Forrester ID: FAPK0130

Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Term: 0530 2004 Fall **Total Active Anticipated Aid:** 3,000.00

Select	Item Type	Description	Career	Disb Plan	Disb ID	Apply Dt	Expire Dt	As of Date/Time	Net Award
<input type="checkbox"/>	900000000105	Federal SEOG Grant	UGRD	01	01	10/15/2004	11/14/2004	10/15/2004 3:50:25PM	2,000.00
<input type="checkbox"/>	900000000200	Federal Work-Study Program	UGRD	01	01	10/15/2004	11/14/2004	10/15/2004 3:50:25PM	1,000.00

[Expire Anticipated Aid](#)

Expire Anticipated Aid page

Expire Anticipated Aid Click this button to set the expire date to the current date. This expires the anticipated aid for the financial aid item type. You must exit the page and access it again to have the expired asterisk appear next to the Net Award amount. After you click the button and exit the page and then access it again, this button is no longer available for this financial aid item type.

The other fields on this page correspond to those on the Anticipated Aid by Term page.

See Also

Chapter 34, "Reviewing Awards," Reviewing Anticipated Aid, page 1213

Reviewing Overaward Amounts

A report is available to help you identify whether any students are in an overaward situation and to review disbursement information for students who are in an overaward situation. An overaward situation occurs when the student receives financial aid for an award period that exceeds the student's COA or need for that award period. This report lists students who have overaward amounts and contains information about their need and disbursements.

This section discusses how to generate the Overaward Report.

Page Used to Review Overaward Amounts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Overaward Report	RUN_CNTL_FA922_RPT	Financial Aid, Awards, Generate Overaward Report, Overaward Report	Generate the Overaward Report.

Generating the Overaward Report

Access the Overaward Report page (Financial Aid, Awards, Generate Overaward Report, Overaward Report).

Overaward Report

Run Control ID: REPORT

[Report Manager](#) [Process Monitor](#) Run

Report Parameters

*Institution:	<input type="text" value="PSUNV"/>	PeopleSoft University
*Aid Year:	<input type="text" value="2005"/>	Financial Aid Year 2004-2005
*Academic Career:	<input type="text" value="UGRD"/>	Undergraduate
*Award Period:	<input type="text" value="A"/>	Academic
Pkg Method (Blank for Both):	<input type="text" value="FM"/>	Federal Methodology

Overaward Report page

- Award Period**

Select the award period for which you want to view overaward amounts. Select *A* – *Academic* for the academic year or *N* – *Non-Standard* for summer and other terms that are not designated as academic terms.
- Pkg Method** (packaging method)

Indicate which packaging method should be used to determine whether a student has an overaward. Select *FM* – *Federal Methodology* to display overawards that exceed FM need or FM COA according to federal regulations, *IM* – *Institutional Methodology* to display overawards that exceed IM need or IM COA according to your institution's rules, or leave the field blank to include both FM and IM overawards.

Note. The Overaward Report is a core report. If you want to use additional criteria when running this report, you can configure the report to suit your needs.

Chapter 35

Notifying Students of Financial Aid Awards

This chapter discusses how to:

- Select students and create a financial aid notification (FAN) extract file.
- Set up printing of FAN using Forms Engine (FE).
- Print FE FAN using Forms Engine.
- Modify FE FAN form letter templates.

Selecting Students and Creating a FAN Extract File

This section provides an overview of FAN processing and discusses how to:

- Assign FAN communications manually.
- Assign FAN communications using mass change.
- Review students selected for award notification.
- Select students to include in the extract file.
- Create the FAN extract file and produce the FAN letter.

Understanding FAN Processing

After packaging students, use the FAN to notify students of their financial aid awards. The FAN includes the name of each award, the amount awarded to the student, and any messages that you designated for a particular financial aid item type. When you define financial aid item types, you select award messages to print on the FAN and specify whether the award should be classified as an award item, other resource, or a custom format when printed on the FAN.

To create a FAN:

1. Assign communications to students.

You can assign a FAN communication to an individual student manually, or you can use Mass Change to assign a FAN communication to a group of students.

2. Select a group of students for which to create an extract file.

3. Create the extract file.
4. Merge the extract file with your selected word processing software to create the actual FAN letter.

Some particulars for FAN processing:

- Aid year is a merge field to enable printing a FAN for multiple aid years.
- Financial aid item types that are designated to be printed as *Other Resources* are summed together and displayed on the FAN as one item in the Eligibility section of the letter. To provide a breakdown of the *Other Resources* total, each financial aid item type designated to print as *Other Resources* appears as a line item in the Financial Aid Offer section of the letter with term amounts and total award amount shown. The message code of *OTHR* identifies each financial aid item type designated to be printed as *Other Resources*. Awards with the *OTHR* message code are not included in the total financial aid offer amount displayed.
- Adjustment reason codes are included in the data extract process so they appear when the FAN is printed. Adjustment reason codes appear only if there has been a change to an award.

Pages Used to Select Students and Create a FAN Extract File

Page Name	Definition Name	Navigation	Usage
Award Notification Selection	FAN_SEL_LET_MC	Financial Aid, Awards, Notification Letter, View Mass Change Selection, Award Notification Selection	Review students selected to receive a financial aid notification letter during the FAN-Select Letter Mass Change process.
Award Notification Selection (process)	RUNCTL_FAN_SEL	Financial Aid, Awards, Notification Letter, Select Award Letter Data, Award Notification Selection	Select a student or group of students to include in extract file used to generate FAN letters. Choose the address and name to be used on the FAN letter.
Award Letter Data Extract	RUNCTL_FAN_EXTRACT	Financial Aid, Awards, Notification Letter, Create Award Letter Data File, Award Letter Data Extract	Create a FAN extract file.
Award Notification Summary	STDNT_FAN_ATRBT	Financial Aid, Awards, Notification Letter, Award Notification Summary, Award Notification Summary	Review award letters for a student.
Summary of Data Printed on FAN	STDNT_FAN_DATA	Financial Aid, Awards, Notification Letter, View Award Letter Data	View the information that was printed on the student's FAN letter.

Page Name	Definition Name	Navigation	Usage
Budget Items	STDNT_FAN_BDGT_SEC	Click the Budget Detail link on the Summary of Data Printed on FAN page.	View the budget categories and amounts that constitute the student's cost of attendance.
Term Award Data	STDNT_FAN_AWRD_SEC	Click the Award Detail link on the Summary of Data Printed on FAN page.	View the student's financial aid package by term.

Assigning FAN Communications Manually

Click the Communication button to access the Communication Management page and assign a FAN communication for an individual student. This button is found on several pages including the:

- Communication Summary page.

You can use this page to see if a FAN communication has already been assigned to this student.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Managing Communications," Reviewing a Summary of Communications.

- Financial Aid Status page.

See Chapter 27, "Preparing for Awarding and Packaging," Reviewing the Student's Packaging Status, page 940.

Assigning FAN Communications Using Mass Change

To assign communications using Mass Change:

1. Update the Mass Change Select Template in the Mass Change Definition component (Campus Community, Communications, Mass Change - Communications, Mass Change Definition) with the criteria that you want to use to select students.
 - a. Select *FAN-Select Letter* as the Mass Change Definition.
 - b. Select the Campus Solutions page, and enter or update the fields as necessary.
 - c. Select the Criteria and Defaults page and use the SQL Statement scroll arrows to find Execution Seq 2, which has a Description of *Select Application Criteria*.
 - d. Update the Field and Field Value entries that you want to use to select students, leaving blank those fields that you are not using.
 - e. Select the Generate SQL page, and click the Mass Change Clear Switch button.
 - f. Click the Mass Change Generate SQL Swch (mass change generate SQL switch) button.
 - g. Click the Count button to make sure that the count (number of students selected) is at least greater than zero.
 - h. Click the Save button, and click OK for any warning messages that appear.
2. Run the Mass Change using the Run Mass Change page.
 - a. Select the Execute Single Mass Change option in the Mass Change Run Type group box.
 - b. In the Mass Change Definition field, select *FAN-Select Letter*.
3. (Optional) Review and edit the selected students on the Award Notification Selection page.
4. Update the Mass Change Update Template in the Mass Change Definition component (Campus Community, Communications, Mass Change—Communications, Mass Change Definition).
 - a. Select *FAN-Update Comm Table* as the Mass Change Definition.
 - b. Select the Campus Solutions page, and enter or update the fields as necessary.
 - c. Select the Generate SQL page, and click the Mass Change Clear Switch button.
 - d. Click the Mass Change Generate SQL Swch (mass change generate SQL switch) button.
 - e. Click the Count button to make sure that the count (number of students selected) is at least greater than zero.
 - f. Click the Save button, and click OK for any warning messages that appear.
5. Run the 3C Engine (Campus Community, Communications, Process, 3C Engine).
 - a. On the Trigger Table page, select the Mass Change option in the Process 3Cs group box.
 - b. Select the Mass Change page.
 - c. Enter *FAN-Create-Communication* in the Mass Change Group ID field.
 - d. Click the Run button.

See Also

Chapter 35, "Notifying Students of Financial Aid Awards," Assigning FAN Communications Using Mass Change, page 1221

Reviewing Students Selected for Award Notification

Access the Award Notification Selection page (Financial Aid, Awards, Notification Letter, View Mass Change Selection, Award Notification Selection).

Award Notification Selection

Mass Change Definition:

FAN-Select Letter

User:

PS

Institution:

PSUNV

Aid Year:

2005

Comm Key:

FANUG

DateTime:

10/15/2004 5:07:18PM

Date:

10/15/2004

Category:

AWARD

Context:

FAN01

Direction:

OUT

Method:

Letter


Communication ID:

Print Comment:

N

Comment:

Mass Change Selection - Results

Customize | Find |  First 1-6 of 6 Last

ID	Name	*Status		
FAD0001	Boyd,Tonya L	Pending	+	-
FAD0002	Advierse,Skye L	Pending	+	-
FAD0006	Badras,Nnamdi C	Pending	+	-
FAD0007	Angel,Nicholas J	Pending	+	-
FAD0009	Arnold,Silena M	Pending	+	-
FAD0010	Abney,Safura	Pending	+	-

Award Notification Selection page

The Mass Change Selection - Results group box lists the students who are selected to receive a FAN by the mass change process.

Status

Specifies the current status of the student's FAN communication, and determines whether the student is selected for inclusion in the extract file. As long as the student does not have a status of *Cancel*, the student is selected for inclusion in the extract file. To prevent a student from receiving a FAN letter, you can either change the student's status to *Cancel* or you can delete the student's row.

Cancel: Select this value to prevent the student from having a FAN communication assigned.

Pending: The student has been selected to have a FAN communication assigned, but it has not yet been assigned (the 3C Engine still needs to be run).

Successful: Indicates that a FAN communication has been successfully assigned to the student.

Selecting Students to Include in the Extract File

Access the Award Notification Selection (process) page (Financial Aid, Awards, Notification Letter, Select Award Letter Data, Award Notification Selection).

Award Notification Selection			
Run Control ID: 1		Report Manager Process Monitor	<input type="button" value="Run"/>
FAN Request Parameters			
ID:	<input type="text"/>	Sequence:	<input type="text"/>
*Institution:	PSUNV PeopleSoft University	Function:	FINA Financial Aid
*Aid Year:	2004 2003-2004	Category:	AWARD Financial Aid Award Notificatn
Career:	UGRD Undergrad	Letter Code:	FAN Financial Aid Notification
*Award Period:	Academic	<input type="checkbox"/> Print Canceled/Declined Awards	
*Address Usage:	SLCT ORD 1	<input type="checkbox"/> Institutional Methodology	
Address Name:	NAME_PREF	<input checked="" type="checkbox"/> Update FAN Attributes	

Award Notification Selection (process) page

ID

To print a FAN letter for only one student, select the student's ID number in this field. Only students who have been assigned a communication with a function of *FINA* are available for selection. If you want to select a group of students, leave this field empty.

Sequence

If you want to print a FAN letter for a group of students, leave this field blank. Select a specific communication for the student. If you leave this field blank, the most recent communication is used. When you select a sequence number, the system populates the Institution, Function, Aid Year, Category, and Letter Code fields.

Institution	<p>If you are selecting a group of students for which to run this process, select the institution that the students attend. When you complete this field, the system automatically populates the Function and Aid Year fields.</p> <p>If you selected an ID, this field is already populated.</p>
Function	The administrative function of the Communication. <i>FINA</i> is the default.
Category	Select <i>AWARD</i> for the FAN letter.
Career	<p>If you select an ID and a sequence, you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career.</p> <p>When selecting a group of students, if you select a career, then only the awards for that career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a specific career.</p>
Letter Code	Select <i>FAN</i> for the FAN letter.
Award Period	Select the award period for which you want the FAN letter created. The default value is <i>Academic.Non Std</i> (non standard) is also available for nonacademic terms. FA Term determines the default for these periods and uses the last effective-dated sequence or effective-dated status. For example, if the default is <i>Academic</i> and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.
Address Usage	The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution.
Address Name	Select the address name that you want to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution.
Print Canceled/Declined Awards	Select if you want the FAN letter to print canceled and declined awards in addition to offered and accepted awards.
Institutional Methodology	Select if you want institutional costs to be included as part of the FAN letter data. The institutional costs are summed into the Personal/Miscellaneous budget category.
Update FAN Attributes	Select to update the information on the Award Notification Summary page and mark the communication record completed. Clear the check box to run the selection process in test mode.
Run	Run the Select students who need a FAN process (FANSEL) when you are ready to select students for the extract file.

Note. Be sure to run the FANSEL process in update mode at least once. If you never run the process in update mode the communication request is never marked as completed and it may always be selected for award notification. If you forget to Update FAN Attributes on this step, you can also update it during the Extract File Creation step.

Creating the FAN Extract File and Producing the FAN Letter

Access the Award Letter Data Extract page (Financial Aid, Awards, Notification Letter, Create Award Letter Data File, Award Letter Data Extract).

Award Letter Data Extract

Run Control ID: 1

Report Manager

Process Monitor

Run

FAN Data Extract Parameters

ID:

*Institution:

PSUNV

PSU

Letter Code:

*Aid Year:

2004

2003-2004

Sequence:

Career:

*Award Period:

Academic

☒ Update FAN Attributes

☒ Use Current Effective Address

File Type:

CSV

☐ Send to Printer

*Address Usage:

SLCT ORD 1

File Path:

Address Name:

NAME_PREF

Template Path:

Award Letter Data Extract page

- ID

Select the student that you are working with if you are creating a FAN letter for only one student. If no ID is selected, all students who have been selected to receive a FAN are included in the extract file.
- Letter Code

Select *FAN*.
- Sequence

This number distinguishes between versions of letters sent to a student. Each time a new communication and award notification letter (FAN) are requested, a sequential number is assigned to the award notification letter. This sequence is increased by one each time an additional award notification letter is requested. The sequence number allows you to select which version of the award notification letter that you want to use if an ID is entered.

Career	<p>If you select an ID and a sequence number you can select a career for the student. If you select a career, only awards for that career are printed on the FAN. If you do not select a career, then awards for all the student's careers are printed on the FAN. If the student is a multiple career student and you want awards for all careers printed on the FAN, do not select a career.</p> <p>When selecting a group of students for whom to run this process, if you select a career, then only the awards for that career for each student are printed on the FAN. If you have multiple career students and you want awards for all their careers to be printed on the FAN, do not select a career.</p>
Award Period	<p>Select the award period for which you want the FAN letter created. The default value is <i>Academic.Non Std</i> (non standard) is also available for nonacademic terms.</p> <p>FA Term determines the default for these periods and now uses the last effective-dated sequence or effective-dated status. For example, if the default is <i>Academic</i> and because different academic statuses are available in FA Term, such as fall 2006-2007, spring 2006-2007, and summer 2007-2008, the system uses the last effective-dated sequence or effective-dated status for that aid year.</p>
Update FAN Attributes	Select to update the Print Status field on the Award Notification Summary page and update the communication record. Clear to run the process in test mode only.
Use Current Effective Address	Select to have the Create Award Data Extract process (FANLTR) reselect the student's name and address information using the information that you enter in the Address Usage and Address Name fields on this page. Clear to have the extract file contain the name and address chosen during the FANSEL process.
Address Usage	The address usage determines which address is printed on the FAN letter. Address usage is defined by your institution. The default value is the address usage from the student selection process.
Address Name	Select the address name to use for this FAN letter. This determines what name is printed on the FAN letter. Address name is defined by your institution. The default value is the address name from the student selection process.
File Type	<p>Select the extract file type to be created. Values are: <i>JetForm</i>, <i>CSV</i>, and <i>Other</i>. <i>JetForm</i> is the default value. The value that you select in this field determines what other file-related fields appear on the page.</p> <p>If you select <i>JetForm</i>, the page displays the File Path and Override Flags fields.</p> <p>If you select <i>CSV</i>, the page displays the Send to Printer check box, the File Path field, and the Template Path field.</p> <p>If you select <i>Other</i>, the page displays the File Path field.</p>
Send to Printer	If you select <i>CSV</i> for the file type and you want the letter to go directly to the printer during the Microsoft Word merge process, select this check box.
File Path	Enter the full path of where you want the extract file to reside after the FANLTR process is run. Include a / or \ at the end of the path, such as C:\TEMP\ or //user/tmp/. Make sure that the destination folder or directory is a valid share folder or directory on the network.

Template Path	If you select <i>CSV</i> for the file type, you must indicate where your award letter master document (FANLTR.doc) and your template file (FANLTR.dot) reside. The Microsoft Word merge process uses this information. This location is usually \\PS_HOME\Winword.
Override Flags	If you select <i>JetForm</i> for the file type, specify print options to use when producing the FAN, such as the number of copies to create.
Run	Click to run this request. Process Scheduler runs the Create Award Data Extract process (FANLTR) at user-defined intervals. After the system runs the process successfully, you can retrieve the extract file from the file path you specified. You can then use the extract file in whatever software you use to create the actual FAN letter.

Printing the Award Letter Using Microsoft Word

To perform a merge using Microsoft Word:

1. Use the Award Letter Data Extract page to create a FAN extract file, using CSV for the file type. The date file output has been changed from .LTR (MS-Word) to .CSV.
2. Specify the file path where you want the extract file and the parameter file to go in the *File Path* field. This can be a shared folder on your local machine or a shared folder on any valid network drive path. An example of a file path is C:\TEMP\.
3. Run the process from the Process Scheduler. When the process completes, the extract file for the FAN (FAN.CSV) and the Word Merge parameters file (FANPARMS.DAT) are located at the file path you specified in Step 2.
4. Move the FANPARMS.DAT file into the C:\TEMP\ folder if it is not already located there.

5. Create a shortcut for MS-Word on your desktop specifically to run the merge process for the FAN letter. You must create this shortcut.
 - a. Open Windows Explorer and find the Winword.exe file (usually in C:\Apps\Office\).
 - b. Drag the button onto your desktop to create a shortcut.
 - c. Right-click the shortcut and select Properties to edit the shortcut properties. Select the Shortcut tab.
 - d. Edit the Target field to include the following parameter path values for launching the Winword file, template, and macro. In this example, we are pointing to C:\PS\LS8\Winword\ to find the FANLTR.DOT file, but you must enter the valid directory where the template resides on your system. However, you must enter /mPRCSFANLTR for the name of the macro.

 You must use a space to separate the path for launching the Winword file (which should already be in the Target field) from the path to the template and to separate the path to the template from the macro name. For example: C:\Apps\Office97\Office\WINWORD.EXE C:\PS\LS\Winword\FANLTR.DOT /mPRCSFANLTR
 - e. Click OK when you finish editing the Target field.
 - f. Rename the shortcut to indicate that the shortcut launches the merge process, such as FAN Winword.exe.
 - g. Double-click the Word desktop shortcut you created to launch the merge process. The merge process creates a file called SAFANLTR.DOC in the C:\TEMP\ folder.
 - h. Open the SAFANLTR.DOC file and print the FAN letters.

Note. If you select the Send to Printer check box on the Award Letter Data Extract page, the file prints automatically on your default printer.

Warning! If you are using Microsoft Office 2000, you must have applied service pack SR1 for the FAN to print. If you have not applied the service pack, the FAN does not print.

Setting Up FAN Printing Using the Forms Engine

This section provides an overview of Forms Engine FAN printing and discusses how to:

- Set up FE Award notification form types.
- Set up FA demographic use information.
- Set up the sort order.
- Set up a printer.
- Set up FE award notification equations.
- Set up FE award notification defaults.

Understanding Forms Engine FAN Printing

Prior to 2003-2004, printing FAN letters required you to initiate a process within the Packaging feature of Financial Aid. Navigate to Report Manager to view the results and print the FAN. Through the use of Forms Engine, an Application Engine program that outputs information in PostScript format, you can print FAN letters directly to your PostScript printer without leaving Packaging. Using Forms Engine for printing FAN eliminates the need for JetForm, Crystal Reports, and Word Merge.

The process prints the award notifications and updates a communications table to indicate that an award communication has been sent. You can initiate a process to print a single FAN letter for an individual student or for students in batch.

The previous process for printing FAN letters remains available. However, the new process is more streamlined and efficient than the previous process.

Pages Used to Set Up FAN to Print Using Forms Engine

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FE Award Notification Form Types (forms engine award notification form types)	FANLTR_FORM_TYPE	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Notification Form Types, FE Award Notification Form Types	Set notification form types.
FA Process Demographic Use	FA_PRCSDemo_TBL	Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use	Indicate from where the student's data should be gathered.
Sort Order Names	SORT_NAME_TBL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Sort Order Names, Sort Order Names	Set the default criteria for the Setup Defaults and Run Controls.
FE Award Notif. Select. Eqtns (forms engine award notification selection equations)	FANLTR_EQTN_SEL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Selection Equations, FE Award Notif. Select. Eqtns	Set up the table for FAN equations.
Printer Name	PRINTER_TBL	Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Printer Names, Printer Name	Set up table for list of available printers. It allows you to define local printer options.

Page Name	Definition Name	Navigation	Usage
FE Award Notification Defaults (forms engine award notification defaults)	FANLTR_DEFAULTS	Financial Aid, Awards, Notification Letter, Award Notification Defaults, FE Award Notification Defaults	Set award notification default information.

Setting Up FE Award Notification Form Types

Access the FE Award Notification Form Types page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Notification Form Types, FE Award Notification Form Types).

Customize Find First 1-2 of 2 Last							
	Form Type	*Description	*Group	*Letter Code	*Category	*Context	
1	1	Initial Notification	FA_AWD_NOTI	FAN	AWARD	FAN01	+ -
2	2	Initial Notification	FA_AWD_SHOI	FAN	AWARD	FAN01	+ -

FE Award Notification Form Types page

Form Type	Identifies the form type for this award notification.
Description	Describes the delivered form type. Form Type 1 is the initial notification of financial aid. Form Type 2 is shorter version of the initial notification.
Group	Identifies in which group of letters this letter code exists.
Letter Code	The code from the Campus Community Standard Letters page for this communication. You can define the letter code for the FE FAN process.
Category	The communications category associated with this letter code. You can define the category for the FE FAN process.
Context	The context from the Campus Community Communications Context page that is included in this category. You can define the context for the FE FAN process


Setting Up FA Demographic Use Information

This setup uses the Campus Community components to evaluate Address and Name Usage processing requirements and to indicate from where the student's demographic information should be gathered.

Access the FA Process Demographic Use page (Set Up SACR, Product Related, Financial Aid, Define Demographic Data Use, FA Process Demographic Use).

FA Process Demographic Use

Process Demo Setup

Customize | Find | View All |  First 1-3 of 3 Last

	Process Name	Address Usage	Perm Addr Usage	Mail Addr Usage	Name Usage	Phone Usage	Email Usage		
1	Award Notification	SLCT ORD 1			NAME USG 1			+	-
2	ISIR Processing	SLCT ORD 1			NAME USG 1	RPT_PHON	RPT_EMAIL	+	-
3	Loan Processing		SLCT ORD 1	SLCT ORD 2	NAME USG 1			+	-

[Address Usage Table](#)[Name Usage Table](#)[Phone Usage Table](#)

FA Process Demographic Use page

Select the appropriate option for each of the fields.

- Process Name

Award Notification process is new to FE FAN. You must insert a new row and select Award Notification as the process name.
- Address Usage

Reserved for financial aid processes and is not used for loans.
- Perm Addr Usage
(permanent address usage)

Used to set the permanent address for loan processing.
- Mail Addr Usage(mail
address usage)

Used for temporary address.
- Name Usage

Indicates which name to use for the student or borrower.
- Phone Usage

Indicates the type of phone such as business phone or cellular phone. Used to select phone usage table settings defined in Campus Community setup.
- Email Usage

Indicates the type of email address such as home, business, dorm, campus, or other. Used to select email usage table settings defined in Campus Community setup.
- Address Usage Table

Click to access the Address Usage page to define or review address usages.
- Name Usage Table

Click to access the Name Usage page to define or review name usages.
- Phone Usage Table

Click to access the Phone Usage page to define or review phone usages.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook


Setting Up the Sort Order

You can sort the data by field to control the order in which the output documents generated by a batch print process appears. Two sort sequences are delivered with the system. FAN PROC 1 displays information by Record, Field Name,Length and Long Name. FAN PROC 2 displays information by Field Name, Long Name, Record, and Length. You must set up any other sort sequences for your institution.

Access the Sort Order Names page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Sort Order Names, Sort Order Names).

Sort Name: FAN PROC 1

Fin Aid Notification Proc 1


Customize Find View All  First 1-9 of 9 Last							
	*Seq	*Field Name	Long Name	Record	*Length	Decimal Positions	
1	1	AID_YEAR	Aid Year	FANLTR_AET	4	0	+ -
2	2	LAST_NAME	Last Name	FANLTR_AET	30	0	+ -
3	3	INSTITUTION	Academic Institution	FANLTR_AET	5	0	+ -
4	4	CAMPUS	Campus	FAN_LSTFATRM_VW	5	0	+ -
5	5	ACAD_CAREER	Academic Career	FANLTR_AET	4	0	+ -
6	6	ACAD_PROG_PRIMA	Primary Academic Program	FAN_LSTFATRM_VW	5	0	+ -
7	7	POSTAL	Postal Code	FANLTR_AET	12	0	+ -
8	8	COUNTRY	Country	FANLTR_AET	3	0	+ -
9	9	EMPLID	EmplID	PERSONAL_DATA	11	0	+ -

Sort Order Names page

Sort Name	The name of the sort sequence.
Seq(sequence)	The hierarchy of how you want data to sort. Use a Zip Code sort to obtain information in the order to use for a bulk mailing.
Field Name	The name of the field.
Length	The character length of the previous field.
Field Long Name	The full name of the field displayed.
Decimal Positions	Displays how many positions appear after the decimal point if this is a numeric field.

Setting Up a Printer

Access the Printer Name page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Printer Names).

Customize Find View All  First 1-2 of 2 Last			
	*Printer Name	Description	Printer Location
1	P06-Professor	UNIX HP LaserJet 4000TN	West side of El Nino
2	\\BUR-PRINT-02\P06-Professor	HP LaserJet 4000TN	West side of El Nino

Printer Name page

Printer Name Enter the printer name and location of the path.


Description Enter the description of the printer.

Printer Location Enter the printer location.

Setting Up FE Award Notification Equations

Access the FE Award Notif Select. Eqtns page (Set Up SACR, Product Related, Financial Aid, Forms Engine Notification, Define Selection Equations).

Note. You must create equations using the Equation Engine prior to setting up the FE Award Notif Select. Eqtns page. See Equation Engine documentation for more information on setting up and using the Equation Engine.

Customize Find View All  First 1-4 of 4 Last			
	*Equation Name	Description	
1	FANLTRDTRANG	Award Ltrs within a date range	
2	FANLTRNONEED	No Need	
3	FANLTRSCHONL	Scholarship Only	
4	FANLTRSEL	Award Ltr Selection Criteria	

FE Award Notif Select. Eqtns page

Equation Name Select the name of the equation.

Description The description of the equation.

Setting Up FE Award Notification Defaults

Access the FE Award Notification Defaults page (Financial Aid, Awards, Notification Letter, Award Notification Defaults).

Note. This page is designed to define the initial setup for the One-Up Print Process and Batch Print Run Controls.

Institution:	PSUNV	PeopleSoft University
Aid Year:	2007	Financial Aid Year 2006 - 2007
Career:	UGRD	*Award Period: Both
		Academic Program: LAU
*Form Type:	1	Initial Notification
Letter Code:	FAN	Group: FA_AWD_NOTIF_LTR
Category:	AWARD	Context: FAN01
*Equation Name:	FANLTRSEL	*Sort Order: FAN PROC 1
*Address Usage:	SLCT ORD 1	Home, Mailing, Permanent, Work
*Name Usage:	NAME USG 1	Pref First, Prim Full
*Printer Name:	\\Your Printer\Path	
Aid Application Status:	Active	Service Impact:
Award Status:		Package Status: Completed
Aid Packaging Method:		*Packaging Methodology: Federal Methodology
*Retention Period:		*Retention Units: Years
*Budget Type:	Budget Categories	
Date Time Format Override		
<input checked="" type="checkbox"/> Include Revisions	<input checked="" type="checkbox"/> Display Customized Messages	
<input checked="" type="checkbox"/> Display Notification Number	<input type="checkbox"/> Display COA Only	
<input checked="" type="checkbox"/> Print Cancels	<input checked="" type="checkbox"/> Display Form Name	
<input checked="" type="checkbox"/> Run Simulation	<input checked="" type="checkbox"/> Print Declines	
<input checked="" type="checkbox"/> Print Via Script	<input checked="" type="checkbox"/> Duplex - Print Both Sides	
<input checked="" type="checkbox"/> Display NID		

FE Award Notification Defaults page

Career	Define the options for financial aid processing. Examples of standard career options are undergraduate or graduate.
Award Period	The award period that is used in packaging. Values include: <i>Academic</i> , <i>Non-Standard</i> , and <i>Both</i> .
Academic Program	Academic program values that are used for financial aid processing.
Form Type	Define and create the values using the Forms Engine. <i>Initial Notification 1</i> and <i>Initial Notification 2</i> (Short FAN) are delivered with the system.
Group	Define this in the Setting Up the Forms Engine. It identifies the Form Type to a specific processing group.

Letter code	The code for the letter associated with this communication. You define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.
Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Equation Name	Define this using the Equation Engine. FANLTRSEL (Award Letter Selection Criteria), FANLTRDTRANG (Award Letters within a Date Range), FANLTRNONEED (Students with No Need) are delivered with the system.
	<hr/> <p>Note.</p> <p>There is a change to the logic behind the FAN letter selection criteria. If you indicate in any of the run controls that cancelled and declined awards should print, the new version of the FANLTRSEL equation excludes letters for students who only have cancelled and declined awards.</p> <hr/>
Sort Order	Defined using the Sort Order Set Up. Sorts FE FAN output by sorting preferences.
Address Usage	Defined using the Process Demo Set Up. Allows you to override Address Usage options.
Name Usage	Defined using the Process Demo Set Up. Allows you to override Name Usage options.
Printer Name	Defined using the Printer Names Set Up. Allows you to select defined printer.
Aid Application Status	The values are based on Packaging Status Summary. Initially set to <i>Active</i> .
Service Impact	Determines whether or not to print a notification based on service impacts.
Award Status	Values are based on the Packaging Award Status field. Initially select <i>Accepted</i> or <i>Offered</i> .
Package Status	Values are based on the Aid Packaging Status field on the Packaging Status Summary page. You should set this option to <i>Completed</i> and never to <i>Repackage</i> .
Aid Packaging Method	Values are based on how aid packages were created. Values are <i>Blank</i> , <i>Auto</i> , <i>Counselor</i> , and <i>Not Packaged</i> . Initially select <i>Blank</i> to ensure that the program evaluates all options.
Packaging Methodology	Values are <i>Federal Methodology</i> and <i>Institutional Methodology</i> .
Retention Period	Indicates the length of time that Forms Engine keeps historical data.

Retention Units	Indicates the unit used in Retention Period. Use <i>Years</i> as the unit to facilitate audit requirements.
Budget Type	Values are <i>Budget Categories</i> (Institutional) and <i>Pell Categories</i> .
Date Time Format Override	(Optional) As a default, the FE FAN prints the date and time format defined for message catalog entry (138,1), which displays throughout the system. For example, if the message catalog entry is set as dd:MMMM:yyyy, which defines a system date-only format, and you need to display a date and 24-hour format for FE FAN only, enter dd:MMMM:yyyy:HH:mm:ss. For more information on defining date and time formats, see the explanation field for the Message Catalog Entry (138,1) in <i>Enterprise PeopleTools PeopleBook: System and Server Administration</i> , "Using PeopleTools Utilities."
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Select to print the number on the aid notification.
Print Cancels	Select to print the information if an award is cancelled.
Run Simulation	Select to run this print job in simulation mode.
Print Via Script	Select to allow for multi-platform printing.
Display NID	Select to display the student's National ID.
Display Customized Messages	Select to display customized, on demand user-defined messages from the FE Award Notification Student Defaults page Comment Box.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the Aid Notification. The system does not display the resource information on the printed aid notification if you select this option.
Display Form Name	Select to display the name of the form on the printed aid notification.
Print Declines	Select to print the information if a student declines an award.
Duplex - Print Both Sides	Select to allow printing of both sides of a page.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Working with Equation Engine"

Chapter 35, "Notifying Students of Financial Aid Awards," Setting Up FE Award Notification Defaults, page 1234

Printing FE FAN Using Forms Engine

This section discusses how to:

- Process and print FE FAN letters in batch.
- Process and print an individual FE FAN letter.
- View FE Award Notification inquiries.
- View award notification summary.
- Reprint FE FAN letters.
- View examples of printed FE FAN letters.

Pages Used to Print FAN Using Forms Engine

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FE FAN Letter Run Control	RUN_CNTL_FANLTR	Financial Aid, Awards, Notification Letter, Award Notification Batch, FE FAN Letter Run Control	Set up to run FAN letters in batch.
FE Award Notification Student Defaults	AWARD_NOTIF_DETAIL	<ul style="list-style-type: none"> • Financial Aid, Awards, Notification Letter, Award Notification One-Up, FE Award Notification Student Defaults • Click the Award Notification link on the Award Entry page. 	Display award status or print an award notification for an individual student.
FE Award Notification Inquiry	AWARD_NOTIF_DETAIL	<ul style="list-style-type: none"> • Financial Aid, Awards, Notification Letter, Award Notification Inquiry, FE Award Notification Inquiry • Click the Award Notification link on the Packaging Status Summary page. 	View award notification detail information.
FE Award Notification Summary	FANLTR_SUMMARY	Financial Aid, Awards, Notification Letter, Award Notification Summary, FE Award Notification Summary	View a summary of the non-simulation award notification processes and the award notification for an individual student.

Page Name	Definition Name	Navigation	Usage
FE Award Notification Reprint	FAN_RPRT_RUNCTL	Financial Aid, Awards, Notification Letter, Award Notification Reprint, FE Award Notification Reprint	Reprint an award notification for an individual student.

Processing and Printing FE FAN Letters in Batch

Access the FAN Letter Run Control page (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Run Control ID: BSC		Report Manager Process Monitor Run
*Sort Order:	FAN PROC 1	
*Expiration Date:	10/04/2005	
*Addr Usage:	SLCT ORD 1	Home, Mailing, Permanent, Work
*Name Usage:	NAME USG 1	Pref First, Prim Full
*Budget Type:	Budget Categories	
*Printer Name:	<input type="text"/>	
*Form Type:	1 Initial Notification	Group: FA_AWD_NOTIF_LTR
Letter Code: FAN	Category: AWARD	Context: FAN01
<div> <input checked="" type="checkbox"/> Use Institutional Methodology <input type="checkbox"/> Display Customized Messages <input type="checkbox"/> Print Cancels <input checked="" type="checkbox"/> Print Declines <input checked="" type="checkbox"/> Duplex - Print Both Sides <input type="checkbox"/> Print Via Script </div> <div> <input checked="" type="checkbox"/> Run Simulation <input checked="" type="checkbox"/> Include Revisions <input checked="" type="checkbox"/> Display Notification Number <input type="checkbox"/> Display COA Only <input checked="" type="checkbox"/> Display Form Name </div>		

FAN Letter Run Control page (1 of 2)

FAN Letter Run Control (2 of 2)

Expiration Date	The date that the information is purged from the system.
Addr Usage (address usage)	Defined using the Process Demo Set Up. This allows you to override Address Usage options defined on the FE Award Notification Defaults page.
Sort Order	Defined using the Sort Order Set Up. This allows you to override the sort order defined in the FE Award Notification Defaults page. It sorts FE FAN output by sorting preferences.
Name Usage	Defined using the Process Demo Set Up. This allows you to override the name usage options defined in the FE Award Notification Defaults page.
Budget Type	Values are <i>Budget Categories</i> (Institutional) or <i>Pell Categories</i> .
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined in the FE Award Notification Defaults page.
Form Type	Defined in the Setting Up the Forms Engine. Identifies the form type to a specific processing group.
Group	Defined in Award Notification Form Type Set Up. Identifies in which group of letters this letter code exists.
Letter Code	The code from the Campus Community Standard Letters page for this communication. You define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. You define this on the FE Award Notification Form Type page.

Context	The context from the Campus Community Communications Context page that is included in this category. You define this on the FE Award Notification Form Type page.
Use Institutional Methodology	Select to use institutional methodology.
Display Customized Messages	Select to display customized, on demand user defined messages from the FE Award Notification Student Default page Comment Box.
Print Cancels	Select to print the information if an award is canceled.
Print Declines	Select to prints the information if an award is declined.
Print Via Script	Select to allow for multi-platform printing.
Run Simulation	Select to run this print job in simulation mode.
Include Revisions	Select to include revisions made to aid packages in the print job.
Display Notification Number	Displays number counter of letter. This information prints on the aid notification.
Display COA Only	Select to display the Cost Of Attendance/Budget information on the aid notification. The system does not display recourse information on the printed aid notification if you select this option.
Display Form Name	Select to display the name of the form on the printed aid notification.

Award Notification Selection

Sequence	Indicates the sequence number.
Selection Criteria Type	Values include <i>Basic Selection</i> , <i>Equation Selection</i> , and <i>Student Override</i> . <hr/> Note. The system displays the following fields when you select <i>Basic Selection</i> . Use the fields to define a simple population selection. <hr/>
Award Period	The award periods used in packaging. Values include: <i>Academic</i> , <i>Non-Standard</i> , and <i>Both</i> .
Academic Program	Academic program values used for financial aid processing.
Academic Career	Define the careers for financial aid processing.
Aid Application Status	Values are based on Packaging Award Status field. You should set this option to <i>Accepted</i> or <i>Offered</i> .
Award Status	Values are based on Packaging Status Summary field, Aid Packaging Status. You should select <i>Packaging Completed</i> .

- Aid Processing Status

Values based on how aid packages were created. Values include *Blank*, *Auto*, *Counselor*, and *Not Packaged*. Initially select *Blank* to ensure that the program evaluates all options.
- Aid Packaging Method

Values are based on Packaging Award Status field. You should select *Accepted* or *Offered*.

FAN Letter Run Control with Equation Selection

Access the FAN Letter Run Control page with Equation Selection (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Award Notification Selection

FindFirst1 of 1Last

Sequence:1

Selection Criteria Type

☐ Basic Selection

☒ Equation Selection

☐ Student Override

*Institution:

*Aid Year:

*Award Period:

Equation Name:

FAN Letter Run Control page with Equation Selection

This selection allows you to select a batch printing population defined by using an equation.

FAN Letter Run Control with Student Override Selection

Access the FAN Letter Run Control page with Student Override (Financial Aid, Awards, Notification Letter, Award Notification Batch, FAN Letter Run Control).

Award Notification Selection

FindFirst1 of 1Last

Sequence: 1

+

-

Selection Criteria Type

☐ Basic Selection

☐ Equation Selection

☒ Student Override

*Institution:

*Aid Year:

*Award Period:

CustomizeFindView AllFirst1 of 1Last

ID	Name		
1	<div></div>	<div></div>	<div>+</div> <div>-</div>

FAN Letter Run Control page with Student Override Selection page

This selection allows you to run batch processes for a single or multiple student IDs if row insert is used.




Processing and Printing an Individual FE FAN Letter

Access the FE Award Notification Student Defaults page (Financial Aid, Awards, Notification Letter, Award Notification One-Up, FE Award Notification Student Defaults).

Note. You must first set default values on the Default Setup Page before using the FE Award Notification Detail page.


Baker,Nikki

ID:FA0273



Aid Year:2004Financial Aid Year 2003-2004

Institution:PSUNV



*Award Period:Both Academic & Non Std

*Printer Name:

*Form Type:1Initial Notification

Group:FA_AWD_NOTIF_LTR

Letter Code:FAN

Category:AWARD

Context:FAN01

Academic

Status:Printed

Comment:

Non Standard

Status:Printed

Comment:

FE Award Notification Student Defaults page

Note. The OK,Cancel, and Apply buttons appear below the page when you access it by clicking the Award Notification link on the Award Entry, Student Aid Package page.

The system displays the ID, Aid Year, and Institution.

Award Period	Award periods used in packaging. Values include <i>Academic</i> , <i>Non-Standard</i> , and <i>Both</i> .
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.
Form Type	Use the Forms Engine to define and create options. Initial Notification Option 1 and Option 2 (Short FAN) are delivered with the system.
Group	Defined in the Setting Up the Forms Engine. Identifies the Form Type to a specific processing group.
Letter Code	The code from the Campus Community Standard Letters page for this communication. Define this on the FE Award Notification Form Type page.
Category	The communications category associated with this letter code. Define this on the FE Award Notification Form Type page.

Context	The context from the Campus Community Communications Context page included in this category. Define this on the FE Award Notification Form Type page.
Academic	
Status	<p>Values include:</p> <p><i>Blank:</i> Package does not exist.</p> <p><i>Initial:</i> Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation.</p> <p><i>Hold:</i> Holds the print option for this award period.</p> <p><i>Revised:</i> Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.</p>
Comment	This allows you to write free form text. This comment prints if the Display Customized Messages check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.
Non-Standard	
Status	<p>Values include:</p> <p><i>Blank:</i> Package does not exist.</p> <p><i>Initial:</i> Automatically switches to this status in preparation of the print process. You can manually reset this after the letter is run in real time. This status does not change to printed if you run the job in simulation.</p> <p><i>Hold:</i> Holds the print option for this award period.</p> <p><i>Revised:</i> Automatically switches to this status after the initial letter prints. You can manually reset this after the letter is run in real time. This status does not change to printed if you run this job in simulation.</p>
Comment	This allows you to write free form text. This comment prints if the Display Customized Messages check box is selected either on the FE Award Notification Defaults page or the FE Award Notification Run Control. The system prints this customized message in addition to any item type related message.

Viewing FE Award Notification Inquiries

Access the FE Award Notification Inquiry page (click the Award Notification link on the Packaging Status Summary page).

Baker,Nikki

ID:FA0273

Aid Year:2004Financial Aid Year 2003-2004

Institution:PSUNV

*Award Period:

Both Academic & Non Std

*Form Type:

Group:

Letter Code:

Category:

Context:

Academic

Status:

Comment:

Non Standard

Status:

Comment:

FE Award Notification Inquiry page

This page is view only. It is intended for front-line users with limited access or security. You cannot process actions or invoke processes from this page.

Viewing Award Notification Summary

Access the Award Notification Summary page (Financial Aid, Awards, Notification Letter, Award Notification Summary).

Award Notification Summary

Rond,Timothy W

ID:FASS0150

Aid Year:2003Financial Aid Year 2002-2003

Institution:PSUNV

[Get PostScript Viewer](#)

DateTime	Form Inst	Preview	Collate Key	Group
1 01/31/2003 8:39:17AM	7	Preview	MAIN UGRDRond 2003PSUNVLAU 90150 USAFASS0150	FA_AWD_NOTIF_LTR
2 01/30/2003 12:28:10PM	6	Preview	MAIN UGRDRond 2003PSUNVLAU 90150 USAFASS0150	FA_AWD_NOTIF_LTR

Award Notification Summary page

Letter Code	Used to generate the FAN letter.
Sequence	A number that distinguishes between versions of letters sent to a student. When you request a new communication and award notification letter (FAN), the system assigns a sequential number to the award notification letter. This sequence increases by one each time you request an additional award notification letter.
Date/Time	Indicates the date and time the letter was created.
Print Status	Indicates whether the letter has been printed, is awaiting printing, or has an error.
Award Period	Indicates the award period for which the FAN letter is printed. FA Term determines the default for these periods and uses the last effective-dated sequence or effective-dated status.
FAN Data	Click to access the Summary of Data Printed on FAN page to view the information that was printed on the student's FAN letter.

Note. To use the preview link, you must load the Get Post Script Viewer program. This program is freeware. You must load the GSVIEW and the GNU GHOSTSCRIPT programs from this link.

This page is view only. It is intended for front-line users with limited access or security.

Click the Preview link to view and reprint a copy of the FE FAN letter associated with the Form Instance number.

Reprinting FE FAN Letters

Access the Award Notification Reprint page (Financial Aid, Awards, Notification Letter, Award Notification Reprint).

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

*Form Process Instance:

*Printer Name:

☐ Duplex - Print Both Sides

☐ Print Via Script

Selection Criteria Type

☒ All

☐ Collation Key Range


Award Notification Reprint page

The system displays the Run Control ID.

Form Process Instance	This information comes from Process Monitor Log Files.
Printer Name	Defined using the Printer Names Set Up. This allows you to override printer selection defined on the FE Award Notification Defaults page.
Print Via Script	Select to allow for multi-platform printing.
Selection Criteria Type	<p>Values include:</p> <p><i>All:</i> Allows you to reprint the entire batch of students for the form process instance.</p> <p><i>Collation Key Range:</i> Allows you to reprint an individual student or a range of students.</p>

Viewing Examples of Printed RE FAN Letters

Financial Aid Award Notification Letter, long version.

	Financial Aid Award Notification Letter							
	PeopleSoft University 4301 Hacienda Boulevard Pleasanton CA 94588	Financial Aid Year 2002-2003						
Initial Notification								
NAME: Timothy Rond 150 TIMOTHY ROND'S HOUSE ENCINO CA 90150	Date: 31 January 2003 Please return within 90 days.							
	ID: FASS0150 SSN: 583-56-4841 Residency: Level: Enrollment by Term <table> <tr> <td>2002 Fall Quarter</td> <td>Three Qtrs</td> </tr> <tr> <td>2003 Winter Qtr</td> <td>Three Qtrs</td> </tr> <tr> <td>2003 Spring Qtr</td> <td>Three Qtrs</td> </tr> </table>		2002 Fall Quarter	Three Qtrs	2003 Winter Qtr	Three Qtrs	2003 Spring Qtr	Three Qtrs
2002 Fall Quarter	Three Qtrs							
2003 Winter Qtr	Three Qtrs							
2003 Spring Qtr	Three Qtrs							
INSTRUCTIONS: <ol style="list-style-type: none"> 1. Read this award notice and follow the instructions. 2. Read Required Reading and be fully aware of your rights and responsibilities in regard to this financial aid offer. 3. Your signature in the Certifications section of this Award Notice indicates that you accept all awards, except those you specifically decline by circling D beside the amounts in each respective column. 4. Please take note of the message codes (if any) for each award line. Each message code is explained in the Messages section. 5. Before accepting loans, refer to pages 5 and 7 in Required Reading. 6. Complete the OTHER AID and CERTIFICATIONS sections of this Award Notice and RETURN it within 30 days. Keep a copy for your records. 7. For questions or concerns, please call the Financial Aid Office at (999) 999-9999. 								

Financial Aid Notification (FAN) Letter, long version (1 of 6)

FINANCIAL AID OFFER:				
Award	Amount			Message
FASS: Work -- QTR	1,800.00	USD	D	FSWK
FASS: Loan -- QTR	9,000.00		D	FSLN
Unsubsidized Stafford - Quarte	2,625.00		D	USUB
TOTAL	13,425.00	USD		
<hr/>				
DISBURSEMENTS BY TERM				
2002 FALL QUARTER				
FASS: Work -- QTR	601.00			
FASS: Loan -- QTR	2,999.70			
Unsubsidized Stafford - Quarte	875.00			
TOTAL 2002 FALL QUARTER	4,475.70			
<hr/>				
2003 WINTER QTR				
FASS: Work -- QTR	599.00			
FASS: Loan -- QTR	2,999.70			

1

Financial Aid Notification (FAN) Letter, long version (2 of 6)

NAME AND IDENTIFICATION:		Financial Aid Year 2002-2003
Timothy Rond		
ID: FASS0150	SSN: 583-56-4841	Initial Notification

FINANCIAL AID OFFER:				
Award	Amount			Message
Unsubsidized Stafford - Quarte	875.00			
TOTAL 2003 WINTER QTR	4,473.70			
<hr/>				
2003 SPRING QTR				
FASS: Work -- QTR	600.00			
FASS: Loan -- QTR	3,000.60			
Unsubsidized Stafford - Quarte	875.00			
TOTAL 2003 SPRING QTR	4,475.60			
TOTAL	13,425.00	USD		

Financial Aid Notification (FAN) Letter, long version (3 of 6)

<div>ESTIMATE OF COSTS</div> <table> <tr> <td>Books and Supplies</td> <td>1,200.00</td> </tr> <tr> <td>Housing</td> <td>7,000.00</td> </tr> <tr> <td>Tuition and Fees</td> <td>19,050.00</td> </tr> </table>		Books and Supplies	1,200.00	Housing	7,000.00	Tuition and Fees	19,050.00	<div>ESTIMATE OF RESOURCES</div> <table> <tr> <td>Parent Contribution</td> <td>0.00</td> </tr> <tr> <td>Student Contribution</td> <td>0.00</td> </tr> <tr> <td>Other Resources</td> <td>0.00</td> </tr> </table>		Parent Contribution	0.00	Student Contribution	0.00	Other Resources	0.00																		
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		<div>BUDGET SUMMARY</div> <table> <tr> <td>TOTAL COSTS:</td> <td>27,250.00</td> </tr> <tr> <td>TOTAL RESOURCES:</td> <td>0.00</td> </tr> <tr> <td>TOTAL NEED:</td> <td>27,250.00</td> </tr> <tr> <td>AID OFFERED:</td> <td>13,425.00</td> </tr> <tr> <td>UNMET NEED:</td> <td>13,825.00</td> </tr> </table>		TOTAL COSTS:	27,250.00	TOTAL RESOURCES:	0.00	TOTAL NEED:	27,250.00	AID OFFERED:	13,425.00	UNMET NEED:	13,825.00																				
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UNMET NEED:	13,825.00																																
<div>OTHER AID:</div> <p>Enter below any other aid (e.g. scholarship, assistantship, state grant) you will receive which was not listed on the first page.</p> <table> <tr> <th>AWARD NAME</th> <th>AWARD TYPE</th> <th>TERM1</th> <th>TERM2</th> <th>TERM3</th> <th>TOTAL</th> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="5">TOTAL OTHER AID:</td> <td></td> </tr> </table>				AWARD NAME	AWARD TYPE	TERM1	TERM2	TERM3	TOTAL																			TOTAL OTHER AID:					
AWARD NAME	AWARD TYPE	TERM1	TERM2	TERM3	TOTAL																												
TOTAL OTHER AID:																																	

Financial Aid Notification (FAN) Letter, long version (4 of 6)

CERTIFICATIONS:	
STATEMENT OF EDUCATIONAL PURPOSE; CERTIFICATION STATEMENT ON REFUNDS AND DEFAULT; DISBURSEMENT PROCEDURES	
<p>I certify that I do not owe a refund on any grant, am not in default on any loan, and have not borrowed in excess of the loan limits, under the Title IV programs at any institution. I will use all money received under Title IV, HEA loan, grant, or work-study programs only for expenses related to my study at _____</p> <p>I have read and I understand the requirements and the conditions applying to financial aid as stated on this award notice and in Required Reading which is incorporated by reference.</p> <p>I authorize _____ to credit the financial aid funds I have accepted against charges on my student account as described in Required Reading.</p> <p>I will inform the Office of Financial Aid if my expected enrollment, residency, grade level or school/college are different from that shown in the Eligibility section of this Award Notice.</p> <p>I understand that I must report any additional aid not shown on this Award Notice. I understand that my aid may be adjusted if additional aid exceeds my demonstrated financial need.</p>	
Student Signature _____	Date _____


3

Financial Aid Notification (FAN) Letter, long version (5 of 6)

MESSAGES:
<p>FSLN: You have been awarded an FASS LOAN. You must (a) subscribe to the conditions of this loan for continued eligibility of this loan; (b) review the enclosed Promissory Note packet carefully; and (c) sign, date, and return the attached promissory note. Failure to meet these requirements in a timely fashion may result in this loan being rescinded.</p> <p>FSWK: You have been awarded a FASS Work Program opportunity. Please report to the Student Employment Placement office prior to 9/18/02 for your placement interview. All recipients of a FASS Work Program award that have not been interviewed by that date may not be placed for work-study in the Fall Term.</p> <p>USUB: You have been awarded a Federal Stafford Unsubsidized Loan, which requires a signed promissory note. You will be receiving this promissory note under separate cover. Once received, please sign and return it to this office.</p> <p>This is a test.</p> <p>This is a test 3. Remove hold. Ok to print.</p>

Financial Aid Notification (FAN) Letter, long version (6 of 6)

Financial Aid Award Notification Letter, short version



Financial Aid Award Notification Letter

PeopleSoft University
4301 Hacienda Boulevard
Pleasanton CA 94588

Financial Aid Year 2002-2003
Notification Number: 1

Initial Notification

NAME:

Angelica Orson
4739 NEY-A-TI HILL
WEST BEND WI 53095

Date: 06 February 2003
Please return within 90 days.

ID: FASS0114
SSN: 446-44-8019
Residency:
Level:
Enrollment by Term

2002 Summer Full-Time
2002 Fall Full-Time
2003 Spring Full-Time

INSTRUCTIONS:

1. Read this award notice and follow the instructions.

2. Read Required Reading and be fully aware of your rights and responsibilities in regard to this financial aid offer.

3. Your signature in the Certifications section of this Award Notice indicates that you accept all awards, except those you specifically decline by circling D beside the amounts in each respective column.

4. Please take note of the message codes (if any) for each award line. Each message code is explained in the Messages section.

5. Before accepting loans, refer to pages 5 and 7 in Required Reading.

6. Complete the OTHER AID and CERTIFICATIONS sections of this Award Notice and RETURN it within 30 days. Keep a copy for your records.

7. For questions or concerns, please call the Financial Aid Office at (999) 999-9999.

Financial Aid Notification (FAN) Letter, short version (1 of 5)

FINANCIAL AID OFFER:					
Award	2002 Sum	2002 Fall	2003 Spr	Message	
FASS: Grant		500.00 D	500.00 D	UGNT	
FASS: Scholarship		500.00 D	500.00 D	SCHL	
FASS: Work		2,500.00 D	2,500.00 D	FSWK	
FASS: Loan	2,000.00 D	4,000.00 D	4,000.00 D	FSLN	
Federal Pell Grant		225.00 D	225.00 D	PELL	
Sub Staff - Sem	525.00 D	1,050.00 D	1,050.00 D	SUB	
Perkins Loan - ELO		2,000.00 D	2,000.00 D	PERK	
TOTAL			24,075.00		

Financial Aid Notification (FAN) Letter, short version (2 of 5)

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ESTIMATE OF COSTS		ESTIMATE OF RESOURCES	
Books and Supplies	1,200.00	Parent Contribution	3,489.00
Housing	7,000.00	Student Contribution	104.00
Miscellaneous and Personal	600.00	Other Resources	0.00
Transportation	1,600.00		
Tuition and Fees	18,700.00		

BUDGET SUMMARY	
TOTAL COSTS:	29,100.00
TOTAL RESOURCES:	3,593.00
TOTAL NEED:	25,507.00
AID OFFERED:	24,075.00
UNMET NEED:	1,432.00

OTHER AID:

Enter below any other aid (e.g. scholarship, assistantship, state grant) you will receive which was not listed on the first page.

AWARD NAME	AWARD TYPE	TERM1	TERM2	TERM3	TOTAL
TOTAL OTHER AID:					

Financial Aid Notification (FAN) Letter, short version (3 of 5)

CERTIFICATIONS:	
STATEMENT OF EDUCATIONAL PURPOSE; CERTIFICATION STATEMENT ON REFUNDS AND DEFAULT; DISBURSEMENT PROCEDURES	
<p>I certify that I do not owe a refund on any grant, am not in default on any loan, and have not borrowed in excess of the loan limits, under the Title IV programs at any institution. I will use all money received under Title IV, HEA loan, grant, or work-study programs only for expenses related to my study at _____</p> <p>I have read and I understand the requirements and the conditions applying to financial aid as stated on this award notice and in Required Reading which is incorporated by reference.</p> <p>I authorize _____ to credit the financial aid funds I have accepted against charges on my student account as described in Required Reading.</p> <p>I will inform the Office of Financial Aid if my expected enrollment, residency, grade level or school/college are different from that shown in the Eligibility section of this Award Notice.</p> <p>I understand that I must report any additional aid not shown on this Award Notice. I understand that my aid may be adjusted if additional aid exceeds my demonstrated financial need.</p>	
_____ Student Signature	_____ Date

2

Financial Aid Notification (FAN) Letter, short version (4 of 5)

MESSAGES:
<p>FSLN: You have been awarded an FASS LOAN. You must (a) subscribe to the conditions of this loan for continued eligibility of this loan; (b) review the enclosed Promissory Note packet carefully; and (c) sign, date, and return the attached promissory note. Failure to meet these requirements in a timely fashion may result in this loan being rescinded.</p> <p>FSWK: You have been awarded a FASS Work Program opportunity. Please report to the Student Employment Placement office prior to 9/18/02 for your placement interview. All recipients of a FASS Work Program award that have not been interviewed by that date may not be placed for work-study in the Fall Term.</p> <p>PELL: You have been awarded a Federal Pell Grant based on a full-time load; if your actual enrollment load changes your award will be adjusted accordingly.</p> <p>PERK: You have been awarded a Federal Perkins Loan. This loan requires a signed Promissory Note, without which, funds will not be disbursed.</p> <p>SCHL: You have been awarded a FASS Scholarship which requires a minimum of a three-quarter-time load to be maintained during all academic terms as well as meeting Satisfactory Academic Progress (SAP). Failure to maintain this minimum enrollment load and these requirements may result in a cancellation of your scholarship.</p> <p>SUB: You have been awarded a Federal Stafford Subsidized Loan which requires a signed promissory Note. You will be receiving this promissory note under separate cover. Once received, please sign and return to this office. If you wish to receive a "Preferred Lender" list, please contact our loan office at 311.292.2932 ext. 4929.</p> <p>UGNT: You have been awarded a University Grant which requires a minimum of a half-time load to be maintained at all times. Failure to maintain this minimum enrollment load may result in a cancellation of your Grant.</p>

Financial Aid Notification (FAN) Letter, short version (5 of 5)

Modifying FE FAN Form Letter Templates

This section discusses how to:

- Change an address.
- Change messages and instructions.

Note. You may want to consult your technical support group before implementing this procedure.

Changing an Address

The system uses the school address information from the Academic Institution Table for the FE FAN letter. To change an academic institution's address, use the Academic Institution 1 page by navigating to Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table.

Changing Messages and Instructions

You can update or change messages and instructions.

To change the *Please return within 90 days.* message:

1. Navigate to PeopleTools, Utilities, Use, Message Catalog.
2. Enter *14402* in the Message Set Number field and click Search.
3. Click Find and enter *98* in the Explorer User Prompt dialog box.
4. Click OK.
5. Use the Message Text field to update the message text.
6. Save your changes.

To change the *Instructions* section:

1. Navigate to PeopleTools, Utilities, Use, Message Catalog.
2. Enter *14420* in the Message Set Number field and click Search.
3. Click Find and enter *180* in the Explorer User Prompt dialog box.
4. Click OK.
5. Update the text in the Explanation field.
6. Save your changes.

To move existing information from one page to another or adding another page, change the Application Engine Program called FAAWDNOTIF.

Note. It is useful to know the page names in Application Designer. The first page of the FE FAN is called FA_AWD_NOTIF_LTR1.

Chapter 36

Processing CommonLine Loans

This chapter provides an overview of CommonLine loan processing and discusses how to:

- Manage promissory notes.
- Originate CommonLine loans.
- Review loan origination information.
- Validate CommonLine loans.
- Manage loan origination transmission data.
- View loan disbursement activity.
- Create CRC loan files.
- Create CL 4 loan files.
- Review and manage CRC XML files.
- Review and manage CL 4 loan files.
- Receive and process CRC inbound files.
- Receive and process CL4 inbound files.
- Manage loans on hold.
- Process loan changes.
- Manage disbursement hold and release processing.
- Resolve change transaction errors.
- Process school certification request applications.
- Adjust loan disbursements manually.

Understanding CommonLine Loan Processing

This section discusses CommonLine loan process flow.

CommonLine Loan Outbound Process Flow

To process Federal Family Education Loan Program (FFELP) and alternative loans, the Campus Solutions system supports both versions of CommonLine, the newer Common Record CommonLine (CRC) and the older CommonLine 4 (CL 4). You use the CommonLine version supported by your lenders, guarantors, and loan servicers; you can process CRC and CL 4 loans separately or simultaneously. This chapter explains how to process loans for both CommonLine versions.

The outbound business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4 is as follows.

1. Student accepts the loan offer made on their financial aid package.
2. The Loan Origination process detects the student's newly accepted loan and calculates application information such as total loan amount, loan period, disbursement amounts and dates, loan servicer, processing type, and whether to process as a CRC or CL 4 loan. The calculated information is stored on the loan origination application tables.

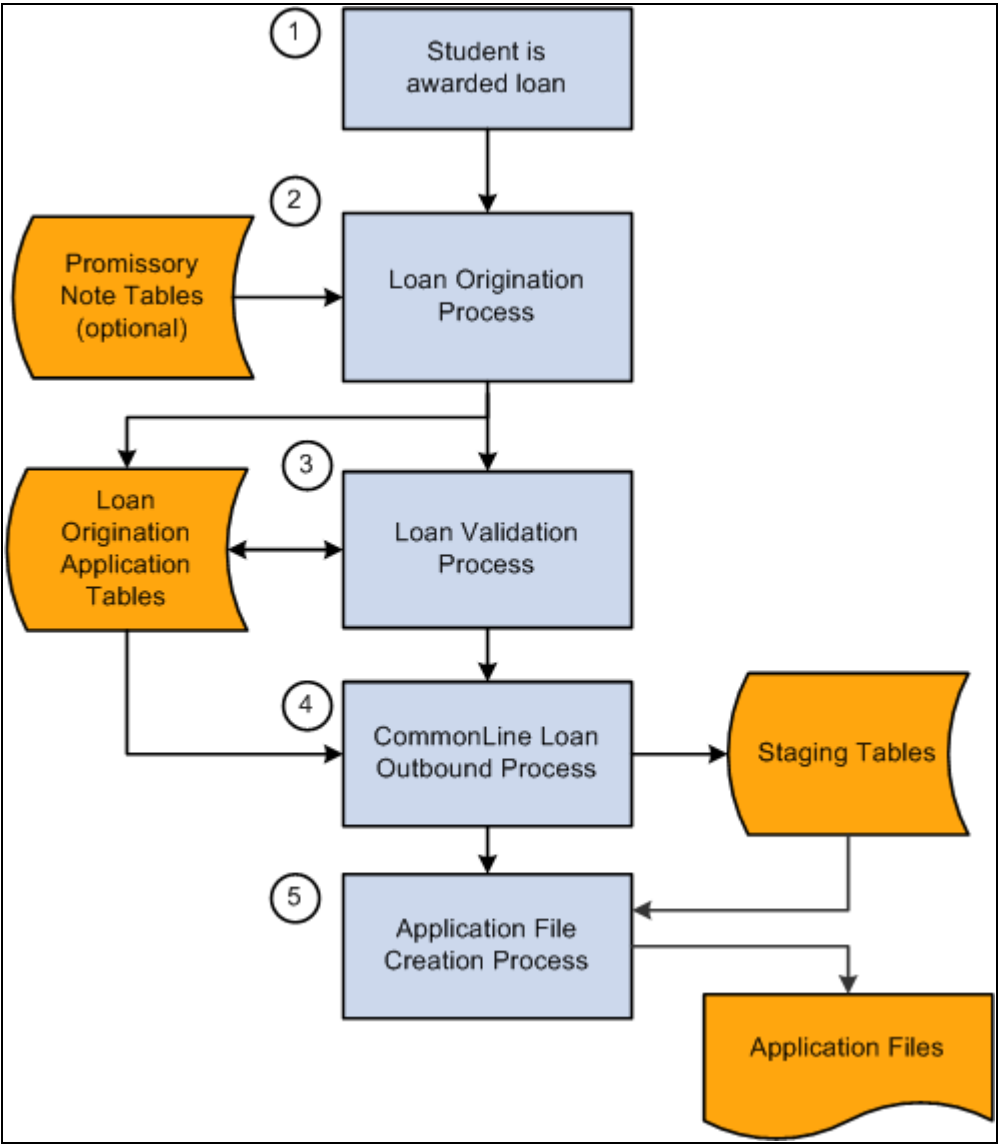
Note. If a Promissory Note is submitted to the school before the loan is originated, the information is used during origination.

3. After origination is complete, Loan Validation process is run to check the loan application for data discrepancies. Loans failing validation are reprocessed in subsequent runs until validation is reached.
4. The CommonLine Loan Outbound process moves validated loans into outbound staging tables.
5. The Application File Creation process creates loan application files from the staging table information. CRC generates files in XML format and CL 4 uses ASCII files.

The system does not provide a method for electronically transmitting CommonLine files to their destinations as each loan servicer might require a specific method to be used, such as FTP or a Web interface.

As discussed later in this chapter, the application files you submit to the loan servicers are processed and you are notified using receipt of response files for each loan processed.

The following illustration shows the flow of CommonLine loan processing:



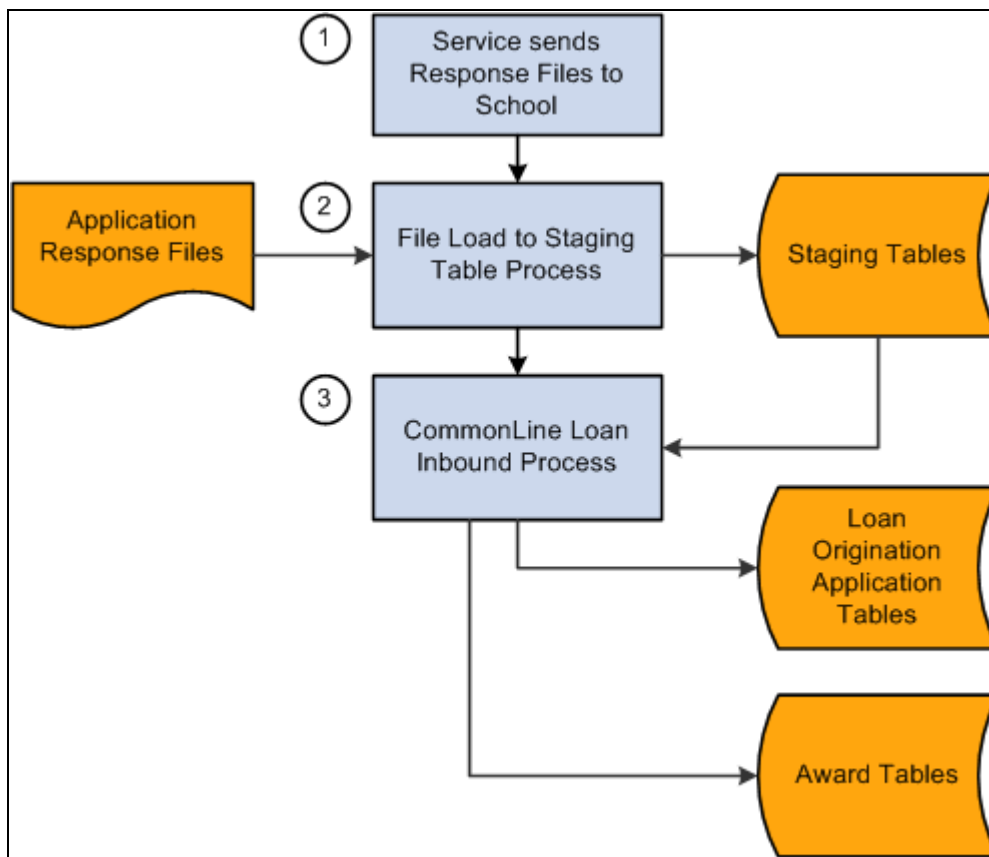
Loan origination outbound process

Although the CommonLine Loan Outbound business process flow is the same for CRC and CL 4, several processing steps require a separate programs for CRC and CL4. The following table indicates where the separate processes exist.

Business Process	Common Record CommonLine	CommonLine 4
Loan validation	CRC validation (Equation Engine)	CL 4 validation (Equation Engine)
CommonLine Loan Outbound	CRC outbound staging (FAPCLOUT)	CommonLine 4 outbound (FAPLCOD4)
Application File Creation	CRC XML outbound (SFA_CRC_OUT)	Outbound EC agent (EDI Manager)

Inbound File Processing

Inbound file processing:



Inbound Processing

Managing Promissory Notes

Schools may choose to collect promissory notes from their students as a condition to process their loan. Campus Solutions components enable schools to enter promissory note information to be used by the loan origination process before the loan is originated. Information from the promissory note pages is used by the origination process to determine the loan destination, process level, and MPN serial loan status. After a loan is originated for a student, all promissory notes entered for the same loan type cannot be used for new loans. Both CRC and CL4 versions use the same components and pages for tracking promissory notes.

This section provides an overview and discusses how to:

- Enter Stafford promissory note data.
- Review biographical and demographic data.
- Review promissory note action status.
- Enter PLUS promissory note data.

- Create loan reference and cosigner relationships.
- Enter alternative loan promissory note data.
- Track CommonLine master promissory note usage.

Pages Used to Manage Promissory Notes

Page Name	Definition Name	Navigation	Usage
CommonLine PNote - Stafford (CommonLine promissory note - Stafford)	SFA_CRC_PNOTE_STAF	Financial Aid, Loans, CommonLine Management, Enter Stafford Prom Notes, CommonLine PNote - Stafford	Enter promissory note data for Stafford loans before loan origination. The system uses this data for origination.
Origination Detail	LN_CL_PNOTE_PD_SEC	Click the Student Data link on the CommonLine PNote - Stafford page. Click the Student Data link on the Promissory Note Plus page. Click the Student Data link on the Promissory Note Alt page.	View the student's current biographical and demographic data.
Loan PNote Action Status (loan promissory note action status)	SFA_CRC_PN_ACTION	Click the Pnote Status link on the CommonLine Pnote - Stafford page. Click the Pnote Status Data link on the Promissory Note Plus page. Click the Pnote Status link on the Promissory Note Alt page.	View or update loan promissory note action status.
Promissory Note Plus	SFA_CRC_PNOTE_PLUS	Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes, Promissory Note Plus	Enter promissory note data for PLUS loans before loan origination. The system uses this data for origination.
Loan Relation (Ref/Cosign) (loan relation [reference/cosigner])	SFA_CRC_PN_RELATN	Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes, Loan Relation (Ref/Cosign)	Assign co-signers, co-maker, or references to a promissory note.
Relationships	RELATIONSHIPS	Click the Related IDs link on the Loan Relation (Ref/Cosign) page.	Identify and create relationships between people or IDs in the system.

Page Name	Definition Name	Navigation	Usage
Current Address Information	LN_ORIG_REL_ADDR	Click the Current Address link on the Loan Relation (Ref/Cosign) page.	View the co-signer's, co-maker's or reference's current address.
Current Employment Information	LN_ORIG_REL_EMPL1	Click the Current Employment Information link on the Loan Relation (Ref/Cosign) page.	View or enter the co-signer's, co-maker's or reference's employment information. Only available when Loan Relation Type and Relationship Nbr fields are populated.
Current Income Information	LN_ORIG_REL_INCOME	Click the Current Income Information link on the Loan Relation (Ref/Cosign) page.	View or enter the cosigner's or reference's income. Only available when Loan Relation Type and Relationship Nbr fields are populated.
Previous Employment Information	LN_ORIG_REL_EMPL2	Click the Previous Employment Information link on the Loan Relation (Ref/Cosign) page.	View or enter the cosigner's or reference's previous employment. Only available when Loan Relation Type and Relationship Nbr fields are populated.
Promissory Note Alt	SFA_CRC_PNOTE_ALT	Financial Aid, Loans, CommonLine Management, Enter ALT Loan Prom Notes, CRC Promissory Note Alt, Promissory Note Alt	Enter promissory note data for alternative loans.
Student MPN Usage (CommonLine master promissory note usage)	LN_CL_MPN_USE	Financial Aid, Loans, CommonLine Management, Maintain Student MPN Usage, CommonLine MPN Usage, Student MPN Usage	View Stafford and PLUS serial master promissory note history. You can also use this page to require a student to sign a new note for each new Stafford or PLUS loan.

Entering Stafford Promissory Note Data

Access the CommonLine PNote Stafford page (Financial Aid, Loans, CommonLine Management, Enter Stafford Prom Notes, CommonLine PNote - Stafford).

CommonLine PNote - Stafford			
Karleen Bell		ID:	FA0608
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution: PSUNV Student Data
Find View All First 1 of 1 Last			
Loan Type Code:	STAF	FFEL Stafford - Sems	Application Number: 1
Lender OPEID:	800720	Bank of America	Lender Branch ID: 0000
Guarantor OPEID:			
Capitalize Interest	Capitalize while in school		PNote Status
References Complete:	Yes		
<input checked="" type="checkbox"/> Borrower Signature		Signature Date:	10/08/2008

CommonLine PNote - Stafford page

This page is used primarily by schools who use the Guarantee Only process level. Because the school has collected the promissory note, the guarantor can immediately approve the loan upon receipt of the loan application.

Loan Type Code	Select from the appropriate Stafford loan types that your institution has set up in the Loan Type Table page.
Lender OPEID (lender office of postsecondary education identifier)	<p>Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination.</p> <p>When you move out of the Lender OPEID and Guarantor OPEID fields, the system displays the name of the agency.</p>
Lender Branch ID	Select the lender branch identification.
Guarantor OPEID (guarantor office of postsecondary education identifier)	Select the guarantor requested by the borrower on the promissory note.
Capitalize Interest	Select either <i>Capitalize while in school</i> or <i>Pay interest while in school</i> .
Borrower Signature	Select if the borrower signed a valid promissory note.
Signature Date	Enter the date the borrower signed the note.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.

Reviewing Biographical and Demographic Data

Access the Origination Detail page (click the Student Data link on the CommonLine PNote - Stafford page, Promissory Note Plus page, or Promissory Note Alt page).

Origination Detail

National ID:560395339

Citizenship Status:

Date of Birth:01/03/1976

Telephone:707/433-3238

FindFirst1 of 1Last

Address Type:MAIL

FindFirst1 of 1Last

Address Line 1:POB 71

Address Line 2:

City:HEALDSBURG

State:CAPostal Code:95448

FindFirst1 of 1Last

Driver's License #B4840418

StateCA

FindFirst1 of 1Last

Email Type

Email Address:

Origination Detail page

View the student's current address, driver's license number, and email address.

Note. The page displays current student information. This information may change when the student's loan is processed.

Reviewing Promissory Note Action Status

Access the Loan Pnote Action Status page (click the Pnote Status link on the CommonLine Pnote - Stafford page, the Promissory Note Plus page, or the Promissory Note Alt page).

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Loan Pnote Action Status			
Loan Type Cd: STAF FFEL Stafford - Sems		Application Nbr: 1	
<div>Find View All</div> <div>First 1 of 1 Last</div>			
Loan Action Type: P Note		Promissory Note Action Seq: 1	
*Loan Action Cd:	E  Received		
Loan Action Dttm:	03/23/2007 4:25:56PM		
Loan Action Status:	Pending	Loan Action Status Dt:	03/23/2007
Loan Receive Date:	03/23/2007 		

Loan Pnote Action Status page

Loan Action Cd (loan action code)

This value is set automatically as the promissory note is processed, but you can override it. Select from:

E: Select this value after you receive the promissory note. This value is automatically set when the promissory note is first entered.

I: Select this value when the promissory note is set to inactive. Set this value manually to cancel the use of the promissory note.

O: Select this value when the promissory note is used for origination. This value is automatically set when the promissory note is used during origination.

Date Received

Record the date when you actually received the promissory note. When you enter a promissory note, the system sets the date with today's date.

Entering PLUS Promissory Note Data

Access the Promissory Note Plus page (Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes, Promissory Note Plus).

Promissory Note Plus		Loan Relation (Ref/Cosign)	
Karleen Bell		ID:	FA0608
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution: PSUNV Student Data
		Find View All First 1 of 1 Last	
Loan Type Code:	PL	FFEL Parent Loan - Sems	Application Number: 1
Borrower ID	<input type="text"/>		
Lender OPEID:	800720	Bank of America	Lender Branch ID: 0000
Guarantor OPEID:	706	California Student Aid Commiss	Borrower Data
References Complete:	Yes	PNote Status	
<input type="checkbox"/> Borrower Signature		Signature Date:	10/08/2008

Promissory Note Plus page

This page is used primarily by schools who use the Guarantee Only process level. Because the school has collected the promissory note, the guarantor can immediately approve the loan upon receipt of the loan application.

Loan Type Code Select from the appropriate PLUS loan types that your institution has set up in the Loan Type Table page.

Borrower ID Select the appropriate parent or guardian of the student.

The information in the Borrower ID field can be changed until the Loan Origination process uses the promissory note data. The Borrower ID field becomes unavailable once the Loan Origination process uses the promissory note data.

To verify if the Loan Origination process has used the Pnote data, navigate to the Loan Pnote Action Status page by clicking the *Pnote Status* link.

Note. Only people related to the student are available. To be an eligible borrower of a student's loan, a relationship with a guardian or parent must be created. Relationships are defined on the Relationships page. To create a relationship to the student, the related person must have an ID assigned, and the guardian status must be set to *Parent, Guardian, or Self*.

Note. Borrower ID does not display for Grad PLUS promissory notes. The Borrower ID is set to *EmplID* internally to avoid defining a student-to-student borrower relationship.

Lender OPEID (lender office of postsecondary education identifier) and Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination.

Guarantor OPEID (guarantor office of postsecondary education identifier) Select the guarantor requested by the borrower on the promissory note.

Borrower Signature	Select if the borrower signed a valid promissory note.
Borrower Data	Click to access the Origination Detail page to review borrower information.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.
Signature Date	Enter the date the borrower signed the note.

Creating Loan Reference and Cosigner Relationships

Access the Loan Relation (Ref/Cosign) page (Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes, Loan Relation (Ref/Cosign)).

The screenshot displays the 'Loan Relation (Ref/Cosign)' page. At the top, there are tabs for 'Promissory Note Plus' and 'Loan Relation (Ref/Cosign)'. Below the tabs, the borrower's name 'Karleen Bell' and ID 'FA0608' are shown. The 'Aid Year' is '2008' and the 'Institution' is 'PSUNV'. The 'Loan Type Code' is empty, and the 'Loan Application Number' is '1'. The 'Num Cosigners Required' and 'Num References Required' fields are also empty. A section for relationship details includes a dropdown for 'Loan Relation Type' set to 'Co-Signer', a 'Relationship Nbr' field with a search icon, and fields for 'Name', 'Guardian', 'Current Address' (set to '1'), 'Relationship', and 'Citizenship Status'. There are also fields for 'Owner/Renter Indicator', 'Monthly Housing Payment', and 'Years at Current Address'. Navigation links like 'Find', 'First', '1 of 1', and 'Last' are visible at the top and bottom of the form.

Loan Relation (Ref/Cosign) page

If cosigners or references are required for the loan type, the system displays the number required. Several of the fields function only when a relationship is identified in the Relationship Nbr field and the Loan Relation Type is *Co-Signer* or *Co-Maker*.

Loan Relation Type	Select from <i>Co-Maker</i> , <i>Co-Signer</i> , or <i>Reference</i> .
Relationship Nbr (relationship number)	When you select a value for the field, the system displays the name, relation, guardian, and citizenship status. This information comes from the Relationships page.

Signature Indicator	Select to indicate a signed note from the cosigner or reference exists.
Owner/Renter Indicator	Specify if the cosigner or reference owns or rents.
Related IDs	<p>Click to access the Relationships page to identify and create relationships between people. For PLUS loans, the relationship to the student is generally the parent or guardian. For alternative loans, the relationship can be a parent, guardian, or a cosigner.</p> <p>See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i>, "Managing Biographical Information," Relating One Individual to Another.</p>
Current Address	Click to access the Current Address Information page to view the cosigner's or reference's current address.
Current Employment	Only available when Loan Relation Type and Relationship Nbr fields are populated. Click to access the Current Employment Information page to enter the cosigner's or reference's employment information.
Income	Only available when Loan Relation Type and Relationship Nbr fields are populated. Click to access the Current Income Information page to enter the cosigner's or reference's income.
Previous Employment	Only available when Loan Relation Type and Relationship Nbr fields are populated. Click to access the Previous Employment Information page to enter the cosigner's or reference's previous employment.

Entering Alternative Loan Promissory Note Data

Access the Promissory Note Alt page (Financial Aid, Loans, CommonLine Management, Enter ALT Loan Prom Notes, CRC Promissory Note Alt, Promissory Note Alt).

Promissory Note Alt		Loan Relation (Ref/Cosign)	
Karleen Bell		ID:	FA0608
Aid Year:	2009	Financial Aid Year 2008 - 2009	Institution: PSUNV Student Data
Find View All First 1 of 1 Last			
Loan Type Code:	TERI	TERI Loan Program	Application Number: 1
Requested Amount:	4000.00		
Capitalize Interest Cd:	Capitalize		
<input checked="" type="checkbox"/> Loan EFT Authorization		<input checked="" type="checkbox"/> Request Loan Deferment	
Lender OPEID:	731140	NEFSC/Mellon Bank	Lender Branch ID: 0000
Guarantor OPEID:	705	Student Loan Guarantee Found	
References Complete:	Yes		PNote Status
<input checked="" type="checkbox"/> Borrower Signature		Signature Date:	10/08/2008

Promissory Note Alt page

Loan Type Code Select from the appropriate Alternative loan types that your institution has set up in the Loan Type Table page.

Requested Amount Enter the requested loan amount. A loan cannot be originated for greater than the requested amount.

Capitalize Interest Cd (capitalize interest code) Select from:
Capitalize: Capitalize interest while in school.
Pay Int: Pay capitalized interest immediately.

Loan EFT Authorization (loan electronic fund transfer authorization) Select to indicate that the borrower has authorized the school to transfer the loan proceeds received by EFT to the appropriate student account.

Request Loan Deferment If eligible, requests to begin repayment of the loan at a later date. Deferment criteria and repayment options are dependent on the particular alternative loan program.

Lender OPEID (lender office of postsecondary education identifier) Select the lender requested by the borrower on the promissory note. If the promissory note is present for the loan when origination runs, the system uses the lender and guarantor OPEIDs to determine the appropriate loan destination.

Lender Branch ID Select the lender branch identification.

Guarantor OPEID (guarantor office of postsecondary education identifier) Select the guarantor requested by the borrower on the promissory note.

References Complete	Select from: <i>Yes</i> : Indicates references are complete. <i>No</i> : Indicates references are not complete.
Borrower Signature	Select if the borrower signed a valid promissory note.
Signature Date	Enter the date the borrower signed the note.
Student Data	Click to access the Origination Detail page to view the student's current biographical and demographic data.
PNote Status	Click to access the Loan Pnote Action Status page to view or update loan promissory note status.

Tracking CommonLine Master Promissory Note Usage

Access the Student MPN Usage page (Financial Aid, Loans, CommonLine Management, Maintain Student MPN Usage, CommonLine MPN Usage, Student MPN Usage).

Student MPN Usage			
Michael Prince		FA0775	
MPN Use History			
Institution:	PSUNV	PeopleSoft University	Loan Category: Stafford
Borrower ID:	FA0775	Michael Prince	*Serial Loan Code: Renew <input type="button" value="v"/>
			Lender MPN Confirmation: <input type="button" value="v"/>
Lender Information			
OPEID:	<input type="text"/>	<input type="button" value="🔍"/>	Branch ID: <input type="text"/>

Student MPN Usage page

Use this page to monitor the status of any Stafford or PLUS master promissory notes that have been guaranteed. The loan origination process uses this information to control whether FFEL loans can be processed serially. Information is entered in the page when a Stafford or PLUS loan is guaranteed. Subsequent loans processed for the student and borrower use the information to determine whether the loan can be processed serially.

In most cases, you are not required to monitor or update information for the student. The system automatically populates this page when confirmation of a valid MPN is reported by the service provider on the CommonLine Application Response file. However, when you must enforce a new MPN to be issued for each loan, you can set the Serial Loan Code field to *New MPN*. After the value is set, the system does not change this value. This ensures that all new loans that are originated request a new promissory note from the student. Users can also add MPN use information on the page to establish the desired serial loan processing in advance of originating loans for the student.

Note. If your school does not process serial loans for all students, use the Deactivate the Serial Loan Activation option on the Financial Aid Installation page.

Serial Loan Code	When a Stafford loan is originated and is guaranteed, the lender indicates whether it is a serial loan. This field displays the value that was requested when the loan was originated. This value is on the Loan Origination 3 page in the CommonLine Management component.
Lender MPN Confirmation	<p>When the loan response file is received, this field displays what the lender determined. When the system loads the response, it updates the Lender OPEID and Lender MPN Confirmation fields. Values are:</p> <p><i>No:</i> A valid MPN does not exist for the borrower.</p> <p><i>Unknown:</i> The lender was unable to determine the borrower's serial MPN status.</p> <p><i>Yes:</i> A valid serial MPN exists.</p>

For future loans, the origination program checks this page to verify serial loan status. For example, if a student applies for another Stafford loan a year later, the system can verify if the previous loan was a serial loan. If it is a serial loan with the same lender, the system originates the new loan as a serial loan and gives it a new effective date.

You can also manually override the default serial MPN setting. Select *N - Use New MPN* from the Loan Origination 3 page in the CommonLine Management component if you do not want a student to be processed for a serial loan. For example, a serial-MPN-eligible school might always want to generate new MPNs for a specific portion of its borrowers, such as law students. If law students are updated on the page so that the Serial Use field is *N-Use New MPN*, all future loans originated require a new MPN until the Serial Loan Code field is reset to *S-Serial, Renew existing MPN*. For PLUS loans, use the loan validation edit to verify that the information for the student, parent, and lender on the page matches that of the originated PLUS loan.

Originating CommonLine Loans

This section provides an overview and discusses how to originate CommonLine loans.

Understanding the Loan Origination Process

Use the loan origination process (FAPLBOG1) to determine student loan eligibility. Eligibility is determined by checking student award information, promissory notes, the student's loan history, and the loan setup parameters used to calculate a new student loan. You can view all originated loans in the Maintain Originated Loans component. During the origination process, key elements are determined to create a complete loan record that can be transmitted to the appropriate lending agency. How these key elements are determined is discussed in this section:

- CommonLine version.
- Process level.
- Serial Loan Code, which supports master promissory note functionality.

Determining the CommonLine Version

The origination process uses loan destination to determine the correct CommonLine version. As described in the Setting Up CommonLine 4 Loans chapter, the origination process determines the assigned lender and guarantor for each loan and then attempts to match the lender or guarantor to an existing CRC loan destination. If found, the system assigns the CL version and destination number to the loan. If not found, then a lender or guarantor match is attempted with the CL 4 loan destinations, and if one is found, the system assigns the CL version and destination number.

Note. If no destination is found for a loan during the Loan Origination process, the program uses the set up on the Loan Destination Default page (Set up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default) to determine the CL version.

If the Use CRC Destination check box is selected on the Loan Destination Default page and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CRC is used.

If the Use CRC Destination check box is cleared on the Loan Destination Default page and the loan destination (CL4 or CRC) cannot be determined when a loan is originated, a CL version of CL4 is used.

The exception to this rule is when the Loan Origination program uses CRC Certification Request data to originate a loan (setup is ignored). If CRC Certification Request data is used *and* no destination is found, a CL version of CRC is used.

After the CL version is set, if you assign or change the loan destination number online, you can only select loan destinations that support the assigned CL version. If you change the CL version, the available loan destination numbers change accordingly. After the destination is assigned online, the system automatically sets the process level, disbursement hold and release, and serial MPN settings to match the loan destination settings.

Note. For the CL version and loan destination number to be assigned correctly, ensure the setup of the schools' loan destination is complete and accurate before you originate loans for the aid year. Refer to the chapter on CL setup for additional details on this topic.

See [Chapter 10, "Setting Up CommonLine 4 Loans," Setting Up Loan Origination, page 321.](#)

Determining the Process Level

The process level field represents the CommonLine process type code value that is reported to the loan servicer. Each process type and level defines a specific loan business process. The supported CommonLine process types are:

- Guarantee Only (GO)
- Guarantee and Print (GP)
- Print and Guarantee (PG,)
- Certification Request (CR)

The process level is based on how the loan promissory note is collected from the borrower. GO implies that the school has collected the promissory note, while GP and PG requests that the note be generated, if necessary, and collected by the loan servicer. The loan origination process automatically determines the process level to use based on the default process levels assigned for each loan destination.

Note. Oracle also provides a process level of Manual (M). Assigning along this process level indicates that the loan is being processed manually and should not be reviewed by any of the automated loan processes or generate an electronic application. This process level is used in cases where the loan servicer does not support electronic loan processing, or you are overriding an existing loan and do not want the loan adjustment or outbound processes to review and possibly manipulate the borrower's loan eligibility.

Determining Serial MPN Eligibility

The serial loan code is set for all originated Stafford and PLUS loans and indicates whether the loan is to be processed as part of a multi-year note (serial processing) or if a new note must be collected for the loan. The system displays these fields on the Loan Origination 3 page in the Maintain Originated Loans component and they are reported using the CommonLine Application Send file.

By default, the system sets the serial loan code based on the loan destination setup unless the process can confirm that the student has a prior loan with the same borrower and the lender confirms possession of the MPN form. The system maintains MPN serial confirmation in the Maintain Student MPN Usage component. Use component. If confirmation is successful, the system sets the serial loan code to *S – Serial, Renew existing MPN*. The loan origination process attempts to determine serial eligibility by confirming that the originated loan has the same borrower and student maintained in the Maintain Student MPN Usage component.

If the loan origination process is unable to assign the borrower ID or the loan destination, the process might not be able to verify the loan's serial eligibility:

- If the origination process cannot assign a borrower ID, then the system sets the serial loan code to *N – Use new MPN*.
- If the borrower ID is set, but not the loan destination, the origination process attempts to determine serial loan eligibility by using both the student ID and borrower ID to find MPN information in the Maintain Student MPN Usage component so it can assign a serial loan code value. If a match cannot be made using this criteria, then the system sets the serial loan code to *N – Use new MPN*.

When a loan is originated with missing borrower or loan destination information, you must complete the loan information before it can be validated and transmitted to the servicer. The system attempts to determine the serial loan code field value when the Borrower ID or Loan Destination Nbr field is modified. For PLUS, if the Borrower ID field is changed, the system checks the CommonLine MPN Use table for a PLUS record that matches the student ID, institution, and borrower ID. If a match occurs, the system sets the serial loan code to comply with the matched record in the Maintain Student MPN Usage component. Renew sets the value to *S – Serial, Renew existing MPN*. If no match occurs, the serial loan code is set to *N – Use new MPN*. When the Loan Destination Nbr is changed and if the Borrower ID field is not blank, the same check occurs.

Note. The system intentionally does not confirm that the lender in the loan destination matches the lender in the MPN Use record. If you require a student to use a new MPN for each loan, use the Maintain Student MPN Usage component to enforce this requirement. For serial PLUS loans, a loan validation edit ensures that the lender for the loan matches the lender listed in the MPN Use record.

Understanding the Loan Processing Status and Loan Origination Transmission

From the time a loan is originated until it is processed by the loan servicer, the system uses a loan processing status field and a loan transmission status field to monitor the loan status:

- The loan process status field monitors the current internal processing state of the loan. Values are:
 - *Cancelled*: A loan cancellation has been initiated.
 - *Hold*: The loan is on hold and the system suspends all loan processing until the hold is removed.
 - *Offered and Not Accepted*: Used by Direct Loans. Origination Pending: Loan has been originated or reset due to a loan rejection, and waiting loan validation.
 - *In Service*: The loan has been transmitted to the appropriate servicer.
 - *Terminated*: A pre-guarantee loan cancellation has been initiated.
- The loan transmission status field monitors the current transmission state of the loan between the school and the loan servicer. Values are:
 - *Accepted*: The servicer has accepted the loan.
 - *Change Pending Transmission*: An adjustment generated a change transaction that has not been sent to the servicer.
 - *Error*: Not used for CommonLine loans.
 - *Origination Pending Transmission*: An Origination that has not been transmitted to the servicer.
 - *Transmitted*: An origination or change transaction has been sent to the loan servicer.

The two fields are displayed throughout the loan process with different labels on three pages:

Page	Loan Process Status	Loan Transmission Status
Loan Status Summary Information	Loan Process Status	Transmission Status
Loan Orig Status	Ln Proc Stat	Orig Trans Stat
CommonLine Loan Origination Transmission	(Loan Processing Stat	Orig Trans Stat

The following table shows how to interpret the loan status based on the field values:

Loan Process Status	Loan Transmission Status	Explanation
Origination Pending	Origination Pending Transmission	Set when a loan is originated. The loan is waiting for the validation process to authorize its transmission.

Loan Process Status	Loan Transmission Status	Explanation
In Service	Transmitted	Set by the CommonLine outbound process. The loan application record is in the staging tables and application files can be created by running the EDI Manager (CL 4) or XML creation (CRC) processes. Note. The loan is considered transmitted to the servicer after the data has been sent to the staging tables and not when the school actually transmits the files.
In Service	Accepted	Set by the CommonLine inbound process. The loan has been processed successfully by the loan servicer.
In Service	Change Pending Transmission	Set by the origination process when a previously approved loan is adjusted. The loan is waiting for the loan validation process to authorize its transmission.
Cancelled	Change Pending Transmission	Set by the origination process when a previously approved loan is cancelled. The loan is waiting for the loan validation process to authorize its transmission.
Cancelled	Transmitted	Set by the CommonLine outbound process when a loan cancellation record is processed. The loan application record is in the staging tables and application files can be created by running the EDI Manager (CL 4) or XML creation (CRC) processes.
Hold	Origination Pending Transmission	Set by the CommonLine Inbound process when a loan has been denied by the loan servicer. If the student is eligible for the loan, the user must perform the corrective action and then remove the hold status. This allows the loan to be reprocessed and retransmitted.
Terminated	Origination Pending Transmission	Set by the origination process for a loan that has been cancelled prior to transmission.

Pages Used to Originate CommonLine Loans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Origination	RUNCTL_LNORIG	Financial Aid, Loans, Process Loans, Loan Origination	Originate loan item types that have an accepted award status.
Process List	PMN_PRCSLIST	Click the Process Monitor link on the Loan Origination page.	View Process Monitor status and messages generated by the load process.
Process Detail	PMN_PRCSRQSTDETAIL	Click the Detail link on the Process List page.	View information on the run status.
Message Log	PMN_BAT_MSGLOG	Click the Message Log link on the Process Detail page.	View any messages generated by the selected process.
Explain	PMN_MSG_EXPLAIN	Click the Explain button on the Message Log page.	View additional information for the selected Message Log message text entry.

Originating CommonLine Loans

Access the Loan Origination page (Financial Aid, Loans, Process Loans, Loan Origination).

Loan Origination page

Use this page to initiate the Loan Origination process (FAPLBOG1), a COBOL SQL process.

CL Orig Options

(CommonLine origination options)

Select from:

Ignore Prom. Notes: The loan origination process originates the loan whether or not a tracked promissory note exists.

Require Prom. Notes: The loan is not originated unless a tracked promissory note can be used to originate the loan.

Use Prom. Note: The system uses the tracked promissory note, but if one is not available, it still originates the loan. This is the default setting. The loan origination process checks for unused promissory notes in the CommonLine Pnote Stafford, CommonLine Pnote PLUS, and CommonLine Pnote Alt pages.

Adjustments

Select to evaluate and process adjustments to existing loans. The system selects and processes origination adjustments for loans in which information has changed that requires a CommonLine change record to be generated. New loans are also originated when this option is selected.

Use Loan Program

Select the check box to activate the loan program field. Users can restrict the origination process to the selected loan program.

The information that you enter in the Selection Criteria group box and the Student Override group box is restricted by the institution, aid year, career, and loan program that you selected in the Control Information group box.

Last Name FROM and Last Name TO Enter two student last names to originate loans for a range of students. Only students with the selected institution, aid year, career, and loan program (optional) are selected. For example, you could originate loans for students with last names from Atkins to McMurphy. You can enter here only if the Student Override check box is clear.

Student Override and ID Select Student Override and an individual student ID to originate loans for a single student or a specific group of students in the selected institution, aid year, career, and loan program (optional). Only students with loans that have a loan award in the *Accepted* status and have remaining loan eligibility are available.

Reviewing Loan Origination Information

This section discusses how to:

- Update borrower information.
- Update loan demographic data.
- Enter loan relationship information.
- Review student loan eligibility.
- Manage FFELP serial loan processing.

Pages Used to Review Loan Origination Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Origination 1	SFA_CRC_LOAN_ORIG	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 1	Review and update student and borrower information, CommonLine version, and loan destination processing options.
Loan Demographic Data – THIS APPLICATION ONLY	LOAN_ORIG_SEC2	Click the Loan Demographic link on the Loan Origination 1 page.	View the borrower's demographic data and the student's term and demographic information. Update loan demographic data used at the time the loan was originated.
Loan Relationship Information	LN_RELATE_SEC	Click the Select Ref/Csgn button on the Loan Origination 1 page.	View or create relationships for the student or borrower.

Page Name	Definition Name	Navigation	Usage
Current Address Information	LN_ORIG_REL_ADDR	Click the Detail link next to the Years at Current Address field on the Loan Relationship Information page.	View the borrower's current address.
Employment Information	LN_ORIG_REL_EMPL1	Click the Current Employment link on the Loan Relationship Information page.	Review and update current job information if you are generating an Alternative Loan Detail record where this information is required by the loan destination.
Current Income	LN_ORIG_REL_INCOME	Click the Income link on the Loan Relationship Information page.	Review and update annual salary, other annual income, and other income sources.
Employment Information	LN_ORIG_REL_EMPL2	Click the Current Employment link on the Loan Relationship Information page.	Enter data from a previous employer.
Loan Origination 2	SFA_CRC_LN_ORIG_FN	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 2	Review and adjust loan start, end, certification, and scheduled disbursement dates.
Loan Origination 3	SFA_CRC_LN_ORIG_CL	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 3	Review and update CommonLine processing options.

Updating Borrower Information

Access the Loan Origination 1 page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 1).

Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation	
ID:	FASLNS028	DAVIS, RICARDO		Institution:	PSUNV		
Career:	UGRD	Undergraduate		Aid Year:	2007		
Loan Type:	FFEL	FFEL Stafford (Qtr)		Appl Seq:	1		
				Loan Status Summary			
Borrower Information							
Borrower ID:	FASLNS028	RICARDO DAVIS					
Borrower SSN:	914-36-0028	Loan Demographic					
Borrower Date of Birth:	07/01/1973	Borr Bio/Demo Data					
Driver's License #:		State:	Select Ref/Csgn				
Borrower Requested Amt:	\$6,625.00						
Parent/Alternative Loan							
Loan Refund Indicator:	Borrower	Stdnt Bio/Demo Data					
		Related IDs					
Process							
Loan Destination Nbr:	3	PNC Bank/USAF			CommonLine Loan Version:		
Processing Level:	GP	Guarantee and Print Appl			CRC		
Servicer OPEID:							
Lender OPEID:	PNC Bank			809921	0000		
Guarantor OPEID:	United Student Aid Funds Inc.			836			

Loan Origination 1 page

Borrower Information

Borrower ID

In most cases, the borrower is the student, but in the case of a PLUS loan, the borrower can be a parent or guardian. Select the borrower ID if no ID is present. For Graduate PLUS loans, the Borrower ID is set to the student EmplID internally to avoid defining a student-to-student borrower relationship and cannot be edited on this page.

Note. Only people related to the student are available. To be an eligible borrower of a student's loan, a relationship with a guardian or parent must be created. Relationships are defined on the Relationships page. To create a relationship to the student, the related person must have an ID assigned, and the guardian status must be set to *Parent*, *Guardian*, or *Self*.

Driver's License

The borrower's driver's license number and state. You can update the fields using the Loan Demographic link.

Loan Demographic

Click to view the borrower's demographic data and the student's term and demographic information on the Loan Demographic Data page.

Borr Bio/Demo Data (borrower biographic demographic data)

Click to access the Biographical Details page and change the borrower name, gender, citizenship, marital status, date of birth, Social Security Number, and address. The link is active only if the Borrower ID field is populated.

Select Ref/Csgn (select references/cosigner)

Click to view or enter data on the Loan Relationship Information page. Available if references and cosigners are required for the loan type.

Parent/Alternative Loan

Information in this group box is used for PLUS and alternative loans.

Loan Refund Indicator	Used for Plus and Alternative loans. Select if loan refunds go to the <i>Borrower</i> or to the <i>Student</i> .
Stdnt Bio/Demo Data (student biographic demographic data)	<hr/> <p>Note. Additional refund setup is required in PeopleSoft Enterprise Student Financials to generate a refund.</p> <hr/> <p>Click to access the Demographic and Address Data page and change the student name, gender, citizenship, marital status, date of birth, Social Security Number, and address.</p> <p>See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i>, "Setting Up Biographical Information."</p>
Related IDs	<p>Click to open the Relationship page. After a parent or guardian has been assigned an ID, use the Relationship page to link data to that person. The person's ID then appears in the Borrower options on the Loan Origination 1 page and can be selected to process a PLUS loan.</p> <p>See <i>PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook</i>, "Setting Up Biographical Information," Setting Up Individual Relationships.</p>

Process

Loan Destination Nbr (loan destination number)	Displays the loan destination number that represents the servicers who process the loan. The loan origination process usually assigns this value, but you must assign a loan destination if the origination process cannot. Selecting the appropriate loan destination is dependent on the CommonLine version of the loan. The CommonLine Loan Version field value controls the available loan destination records that you can select. When changes occur to the loan destination value, the system resets the loan process level, disbursement hold and release status, and serial loan processing fields to the new loan destination's default values.
--	---

Processing Level
(process level)

Values are:

CR - School Certification Request: Select if you are processing a loan using the CommonLine certification request.

D - Direct: Used for Direct Loan only and is invalid value for CommonLine loans.

GO - Guarantee Only: Select to have the service provider only guarantee the loan.

GP - Guarantee and Print Appl: Select to have the service provider guarantee the loan and then print and mail a promissory note to the borrower.

M - Manual: Select if you do not want the loan to be processed electronically. No application files are created for loans with this setting.

PG - Print and Guarantee: Select to have the service provider print and mail a promissory note to the borrower and guarantee the resulting loan after receipt of the promissory note.

**Servicer, Lender, and
Guarantor OPEID**
(office of postsecondary
education identifier)

Indicates the assigned agencies associated with the Loan Destination Number.

**CommonLine Loan
Version**

Indicates the CommonLine version of the loan destination. Can be changed to reassign the loan destination that supports the adjusted CommonLine version.

CL4: CommonLine version 4

CRC: Common Record CommonLine version

For more information, refer to the "Determining the CommonLine Version" section earlier in this chapter.

Note. Parent or guardian borrowers must exist on the Personal Data page and have an ID assigned to them. They must be defined as a related parent or guardian for loan processing.

Updating Loan Demographic Data

Access the Loan Demographic Data - THIS APPLICATION ONLY - page (click the Loan Demographic link on the Loan Origination 1 page).

Loan Demographic Data - THIS APPLICATION ONLY -			
ID:	FASSLNS028	RICARDO DAVIS	Career: UGRD
Loan Type:	FFEL Stafford (Qtr)	Appl Seq: 1	<input type="checkbox"/> Demo Chg
Borrow Demographic Information			
Borrower ID:	FASSLNS028	RICARDO DAVIS	
Borrower SSN:	914-36-0028	Visa/Permit:	
Borrower Date of Birth:	07/01/1973	Citizenship:	Native
Driver's License #:	<input type="text"/>	<input type="text"/>	
Borr Default / Owes Refund:	<input type="text"/>		<input type="button" value="Update Borr Demo"/>
Term Information			
Completion Date:	08/14/2015	2015 SmQt	Term: <input type="text"/>
Loan Year:	1st Yr Prv	Academic Level:	Freshman
Direct Lending Year	<input type="text" value="1st Yr,prv"/>	Academic Load:	Full-Time
			<input type="button" value="Update Term Data"/>
Student Demographic Information			
SSN:	914-36-0028	Citizenship:	Native
Birthdate:	07/01/1973	Visa/Permit:	
Depend Stat (Fed):	Indepndnt	Total Debt:	<input type="text" value="\$0"/>
Stdnt Default / Owes Refund:	<input type="text"/>		<input type="button" value="Update Student Demo"/>

Loan Demographic Data - This Application Only page

To update the loan origination data, you must first update the student's information in Campus Community Fundamentals or FA Term record and then use this page to retrieve and update the loan information. When you run the Loan Origination process with Adjustments selected, the student's program complete date (graduation date) and National Student Loan Data System (NSLDS) Loan Year in the FA Term record.

The changes that you make on this page apply only to the current loan application. If you have several loan applications for a single student, make changes for each loan application.

Demo Chg (demographic change) Select to make the updateable fields available for entry.

Borrow Demographic Information

License # Select a driver's license number for the borrower. The system updates the drivers license state field based on the drivers license selected.

Borr Default/Owes Refund Select *No* or *Yes* to indicate whether the borrower is in default or owes a refund to the federal government. Select *Overridden* to override the borrower's status.

Visa/Permit (borrower visa/permit) Indicates the borrower's visa ID.

Update Borr Demo
(update borrower
demographic)

Click to move the most current information from Campus Community Fundamentals (personal data) to the loan application that you are currently using. For example, to change the borrower's date of birth, go to the Biographical Details page to change date of birth. Then return to the Loan Demographic Data page and click the Updt Borr Demo button to display the changed information. The system also updates the Borr SSN, Borr Vs/Pmt, and Borr Citizenship fields when you click this button.

Term Information

**Term and Update Term
Data**

Select a term and then click the button to move information from the financial aid term to the loan application that you are currently using.

Student Demographic Information

Total Debt

Displays the student's lifetime aggregate amount for all loan types. This field is used for some alternative loans and is manually set.

**Stdnt Default/Owes
Refund** (student
default/owes refund)

Select *No* or *Yes* to indicate whether the student is in default or owes a refund. Select *Overridden* to override the student's default status.

Update Student Demo
(update student
demographic)

Click to move information from Campus Community Fundamentals to the loan application that you are currently using. The system updates the SSN, Birthdate, Citizenship, and Visa/Permit fields.

Entering Loan Relationship Information

Access the Loan Relationship Information page (click the Select Ref/Csgn button on the Loan Origination 1 page).

The fields in this component represent the fields listed in the CommonLine Alternative Loan and Reference Information records in the Application Send file. The data collection requirements depend on the loan program.

See [Chapter 36, "Processing CommonLine Loans," Creating Loan Reference and Cosigner Relationships, page 1267.](#)

Reviewing Student Loan Eligibility

Access the Loan Origination 2 page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 2).

Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation		Loan Orig Status	
ID:	FASSLNS028	DAVIS,RICARDO	Institution:	PSUNV					
Career:	UGRD	Undergraduate	Aid Year:	2007					
Loan Type:	FFEL	FFEL Stafford (Qtr)	Appl Seq:	1					
Loan Status Summary									
Loan Application Data									
Origination Total:	\$6,625.00		Loan Period Start:	09/06/2006		<input type="checkbox"/> Override Loan Dates			
			Loan Period End:	06/05/2007		Loan Certification Date:	03/28/2006		
Origination Detail									
Find View All First 1 of 2 Last									
Borrower Requested Amt:	\$2,625.00		Item Type:	9000000000378 Subsidized Stafford - Quarter					
Loan Certified Amount:	\$2,625.00		Loan Application ID:	0013150000A6PU003		Update ID			
Loan Approved Amount:	\$0.00		Anticipated Net Amount:	\$2,520.79		Anticipated Loan Fees:	\$104.21		
Customize Find View All First 1-3 of 3 Last									
Disbursements Hold/Release Direct Disbursement									
Disbursement ID	Request Date	Disbursement Amount	Net Disbursement						
01	08/23/2006	\$875.00	\$840.27						
02	12/20/2006	\$875.00	\$840.26						
03	03/14/2007	\$875.00	\$840.26						

Loan Origination 2 page: Disbursements tab

Loan Period Start and **Loan Period End** Generated from the Valid Careers for Terms table.

Loan Certification Date The date the loan is originated.

Update ID Click to update the loan application ID.

Override Loan Dates Select to make the loan period start, loan period end, loan certification, and disbursement date fields available for editing.

Hold Release Tab

Select the Hold/Release tab.

Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation		Loan Orig Status	
ID:	FASSLNS028	DAVIS,RICARDO	Institution:	PSUNV					
Career:	UGRD	Undergraduate	Aid Year:	2007					
Loan Type:	FFEL	FFEL Stafford (Qtr)	Appl Seq:	1					
Loan Status Summary									
Loan Application Data									
Origination Total:	\$6,625.00		Loan Period Start:	09/06/2006		<input type="checkbox"/> Override Loan Dates			
			Loan Period End:	06/05/2007		Loan Certification Date:	03/28/2006		
Origination Detail									
Find View All First 1 of 2 Last									
Borrower Requested Amt:	\$2,625.00		Item Type:	9000000000378 Subsidized Stafford - Quarter					
Loan Certified Amount:	\$2,625.00		Loan Application ID:	0013150000A6PU003		Update ID			
Loan Approved Amount:	\$0.00		Anticipated Net Amount:	\$2,520.79		Anticipated Loan Fees:	\$104.21		
Customize Find View All First 1-3 of 3 Last									
Disbursements Hold/Release Direct Disbursement									
Disb Hold/Release Status									
Anticipated Disbursement Date									
H			Hold Disbursement		08/23/2006				
H			Hold Disbursement		12/20/2006				
H			Hold Disbursement		03/14/2007				

Loan Origination 2 page: Hold/Release tab

Disb Hold/Release Status (disbursement hold/release status)

Automatically set during origination and when you use the Hold and Release process. The field can be manually set or reset by the Hold and Release process. Select from:

F: Forwarded to CDA. This is an intermediate status communicated from the lender and is not a valid selection.

H: Hold Disbursement. Indicates the disbursement to be held by the lender.

N: Not Supported. Indicates that the loan destination does not participate in the disbursement hold and release process.

R: Release Disbursement. Indicates the disbursement to be released to the school.

Direct Disbursement Tab

Select the Direct Disbursement tab.





Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation		Loan Orig Status	
ID:	FASSLNS028	DAVIS,RICARDO	Institution:	PSUNV					
Career:	UGRD	Undergraduate	Aid Year:	2007					
Loan Type:	FFEL	FFEL Stafford (Qtr)	Appl Seq:	1					
Loan Status Summary									
Loan Application Data									
Origination Total:	\$6,625.00		Loan Period Start:	09/06/2006		<input type="checkbox"/> Override Loan Dates			
			Loan Period End:	06/05/2007		Loan Certification Date:	03/28/2006		
Origination Detail									
Find View All First 1 of 2 Last									
Borrower Requested Amt:	\$2,625.00		Item Type:	900000000378 Subsidized Stafford - Quarter					
Loan Certified Amount:	\$2,625.00		Loan Application ID:	0013150000A6PU003		Update ID			
Loan Approved Amount:	\$0.00		Anticipated Net Amount:	\$2,520.79		Anticipated Loan Fees:	\$104.21		
Customize Find View All First 1-3 of 3 Last									
Disbursements Hold/Release Direct Disbursement									
Disbursement ID		Disb Direct to Borrower							
01		<input type="checkbox"/>							
02		<input type="checkbox"/>							
03		<input type="checkbox"/>							

Loan Origination 2: Direct Disbursement tab

Disb Direct to Borrower (Disburse Direct to Borrower) Select this check box to request that a disbursement be made directly to the student by the lender. If the lender participates, this optional CommonLine process is valid for all CommonLine loan types. The value is transmitted in the application send file, but is not supported in the change transaction send file.

Managing FFELP Serial Loan Processing

Access the Loan Origination 3 page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 3).

Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation		Loan Orig Status	
ID:	FASSLNS028	DAVIS,RICARDO		Institution:	PSUNV				
Career:	UGRD	Undergraduate		Aid Year:	2007				
Loan Type:	FFEL	FFEL Stafford (Qtr)		Appl Seq:	1				
   Loan Status Summary									
Loan Options									
EFT Authorization:	<input type="text"/>			<input type="checkbox"/> Lender of Last Resort					
Capitalize Interest:	<input type="text"/>			<input type="checkbox"/> Manual Origination Ind					
Request Deferment:	<input type="text"/>								
Promissory Note Information									
Fed App Type:	STAF MPN <input type="text"/>			MPN Confirmation:					
Serial Loan Code:	N <input type="text"/>  Use new MPN			Borrower Confirmation:					
Pnote Amt Req:				E-Sign Type:					
Servicer Information									
Find First <input type="text"/> 1 of 2 <input type="text"/> Last									
Item Type:	900000000378 Subsidized Stafford - Quarter			Service Type Cdt:					
Ln Int Attr:	Subsidized			Reduction Code:					
Loan Sequence Nbr:	0			Revised NOG Ind:					

Loan Origination 3 page

Loan Options

EFT Authorization

(electronic funds transfer authorization)

Select an option for electronic funds transfer authorization. Otherwise, the origination process does this automatically, based on the tracked promissory note. Not applicable for loans using a Stafford or PLUS Master Promissory Notes where EFT authorization is automatically assumed by the loan servicer.

Select from:

Yes: Authorize electronic funds transfer.

No: Do not authorize electronic funds transfer.

Capitalize Interest

Select *Capitalize* or *Pay Int* to indicate the student's choice of making interest payments on any unsubsidized portion of the loan while in school. Otherwise, the origination process does this automatically, based on the tracked promissory note.

Request Deferment

Select *Yes* or *No* to indicate a request to the lender to defer repayment of the loan if the borrower is eligible. Not applicable for loans using the Stafford or PLUS master promissory notes where a deferment is automatically assumed by the loan servicer.

Lender of Last Resort

For information only. Select if this option is applicable to the loan.

Manual Origination Ind (manual origination indicator)

This field is deactivated and only indicates whether the indicator was set for originated loans.

Promissory Note Information

Fed App Type (federal application type)	<p>Indicates the promissory note used to originate the FFELP loan. Assigned during origination but can be reset manually. Select from:</p> <p><i>PL 4/25/94</i>: Old PLUS promissory note. No longer a valid selection for new loans.</p> <p><i>PLUS MPN</i>: The current valid PLUS Master Promissory Note.</p> <p><i>STAF MPN</i>: The current valid Stafford Master Promissory Note.</p> <p><i>Sta 1/3/94</i>: Old Stafford Application. No longer a valid selection for new loans.</p> <p><i>Grad PLUS</i>: The current valid Graduate PLUS promissory note.</p>
Serial Loan Code	<p>Indicates the request for the lender to process the loan using the current master promissory note, or request a new note to be collected from the borrower. Assigned during origination but can be reset manually.</p> <p>Select <i>N</i> (Use new MPN) or <i>S</i> (Serial, Renew existing MPN).</p>
Pnote Amt Req (promissory note amount request)	<p>Displays the amount the student requested on the promissory note used to guarantee the loan. Populated by the loan origination process if a promissory note is used to originate the loan. It also can be updated upon receipt of the application response file when the loan is guaranteed, if the promissory note is issued and collected by the loan servicer. Any increases to the loan cannot exceed this value. A new loan is created if the borrower's loan eligibility exceeds the promissory note amount requested. This field is blank for Stafford and PLUS loans because the amount is no longer captured on the MPN forms.</p>
MPN Confirmation (master promissory note confirmation)	<p>Displays master promissory note confirmation. This code is loaded from the CommonLine Application Response record and indicates whether a service provider has a valid MPN or if the status is unknown.</p> <p><i>Y</i>: (Yes) A valid master promissory note exists.</p> <p><i>N</i>: (No) A master promissory note does not exist.</p> <p><i>U</i>: (Unknown) The service provider cannot confirm that the lender holds the note.</p>
Borrower Confirmation	<p>Indicates whether the service provider has received borrower confirmation of the loan request.</p>
E-Sign Type	<p>This is the reported holder of the student's electronic signature source for the loan promissory note. Although a school is not required to hold or report this information, if received from a loan servicer, the code is loaded to the application.</p>

Servicer Information

Loan Sequence Nbr (loan sequence number)	<p>A value assigned by the loan servicer when the application is guaranteed. The value is used to uniquely identify the loan.</p>
---	---

Service Type Cd
(service type code),

Populated by the CommonLine application response file. Except for values 01 and 02, the codes are valid for both CL4 and CRC loans:

01: For CL4, Lender requested to issue funds to school. No Reference @5 Detail Record included.

01: For CRC, File creator processed application; file initiator does not initiate disbursement.

02: For CL4, Lender requested to issue funds to disbursing agent. No Reference @5 Detail Record included.

02: For CRC, File creator processed application; file initiator to initiate disbursement.

03: Lender requested to issue funds to school. Reference @5 Detail Record included.

04: Lender requested to issue funds to disbursing agent. Reference @5 Detail Record included.

05: File creator processed application; file creator does not initiate disbursement. No Reference @5 Detail Record included.

06: File creator processed application; file creator to initiate disbursement. No Reference @5 Detail Record included.

07: File creator processed application; file creator does not initiate disbursement. Reference @5 Detail Record included.

08: File creator processed application; file creator to initiate disbursement. Reference @5 Detail Record included.

Reduction Code

Populated by the CommonLine application response file.

01: Approved for requested amount.

02: Reduced to maximum for grade level.

03: Reduced to maximum for career.

04: Reduced to maximum for period.

05: Lender approved amount.

06: Reduced to unmet need.

07: Reduced to maximum for guarantor.

08: Reduced to school certification amount.

09: Reduced to maximum for endorser.

10: Reduced to maximum of guarantor policy.

11: Reduced by borrower.

Revised NOG Ind
(revised notice of
guarantee indicator)

Populated by the CommonLine application response file.

N: Revised notice of guarantee is not sent.

U: Unknown.

Y: Revised notice of guarantee is sent.

See Also

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual

Validating CommonLine Loans

This section discusses how to:

- Validate CRC loans.
- Validate CommonLine 4 loans.
- Review CommonLine validation edit error messages.
- Review CommonLine loan status information.

Pages Used to Validate CommonLine Loans

Page Name	Definition Name	Navigation	Usage
Validate CRC Loans	SFA_CRCLNED_RUNCTL	Financial Aid, Loans, CommonLine Management, Validate CRC Loans	Create loan validation requests and run the loan validation process for CRC loans. You can also run this process in simulation mode where edit error messages are generated, but the status of the loan is not updated.
Validate CL 4 Loans	LN_EDIT_RUNCTL	Financial Aid, Loans, CommonLine Management, Validate CL 4 Loans	Create loan validation requests and run the loan validation process for CL 4 loans. You can also run this process in simulation mode where edit error messages are generated, but the status of the loan is not updated.
Loan Validation	SFA_CRC_LN_ORIG_ER	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Validation	Review edit error messages found after the loan validation process. After you correct the errors, rerun the loan validation process. Make sure that no errors exist before generating outbound loan files. Use the online loan validation process to validate CRC loans.

Page Name	Definition Name	Navigation	Usage
Origination Detail	LN_ORIG_TRANS_SEC	Financial Aid, Loans, CommonLine Management, Override Loan Status. Click the top Detail link.	Manually set the Loan Action Status field to <i>Authorized</i> .
Loan Status Summary Information	SFA_CR_STATSUM_SEC	Click the Loan Status Summary link on any page in the Originate Loan component.	View information about a student's loan eligibility by viewing the current loan level and disbursement level statuses.

Validating CRC Loans

Access the Validate CRC Loans page (Financial Aid, Loans, CommonLine Management, Validate CRC Loans).

Validate CRC Loans page

If you originate loans under Common Record CommonLine, run the CRC loan validation process (FAPREQRN) to check loan origination records for errors. You must validate originated loans for the system to create and transmit a CommonLine Application Send file to the loan servicer. Each validation request comprises one or many selection criteria. To control the frequency that loan validation requests are executed, run the validation process by maintaining multiple validation requests.

Validating CommonLine 4 Loans

Access the Validate CL 4 Loans page (Financial Aid, Loans, CommonLine Management, Validate CL 4 Loans).

Validate CL 4 Loans

Run Control ID: AUDITS [Report Manager](#) [Process Monitor](#) Run

Find First 1 of 1 Last

*Institution:	PSUNV	PeopleSoft University
*Aid Year:	2008	Financial Aid Year 2007 - 2008
*Academic Career:	(Invalid Va	Undergraduate

☒ **Loan Edit Update Run**

Validate CL 4 Loans page

If you originate loans under CommonLine 4, run the CommonLine 4 loan validation process (FAPREQRN) to check loan origination records for errors. Originated loans must be validated for a CommonLine Application Send file to be created and transmitted to the loan servicer. Each validation request comprises one or many selection criteria. To control the frequency that loan validation requests are executed, run the validation process by maintaining multiple validation requests.

Loan Edit Update Run Select to have the loan validation process update the target loan origination records action status. If you clear this check box and run the process in simulation mode, only edit error messages are produced.

Reviewing CommonLine Validation Edit Error Messages

Access the Loan Validation page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Validation).

Loan Origination 1
Loan Origination 2
Loan Origination 3
Loan Validation

ID:	FA0730	Baen,Jeremiah J	Institution:	PSUNV
Career:	UGRD	Undergraduate	Aid Year:	2005
Loan Type:	STAF	FFEL Stafford - Sems	Appl Seq:	2

[Loan Status Summary](#)

Origination Detail
Find First 1 of 1 Last

Item Type: 900000000305 Fed Stfd Loan-Unsubsidized	Certified Amount: \$4,000.00
---	-------------------------------------

Validate Loan

Loan Validation Errors
Customize | Find | View All | First 1-2 of 2 Last

Equation Name	Description
FACRADDR01	Permanent address missing.
FACRNAME01	Student name is missing.

Loan Validation page

When the Loan Edit Update Run Option process validates a loan, the system sets the loan action status to *Authorized for transmission* on the Loan Status Summary Information page. If the loan fails validation, the loan action status is set to *Failed* (authorization) and an explanatory edit error messages is displayed. If the loan contains separate subsidized and unsubsidized item type origination detail records, there are separate loan action statuses and edit error messages for each.

To resolve loan validation edit errors, review the CL 4 or CRC loan edit table in the CommonLine setup chapters for information on causes for validation failure. Correct the edit error condition and then rerun the validation process. Failed loans become authorized when all the error conditions have been corrected.

If an edit error is not appropriate for the loan destination, you can permanently deactivate the edit in the corresponding loan destination component. To authorize a failed loan without clearing the edit error conditions, manually set the loan action status to *Authorized* on the Origination Detail page. Review the CL Validation Errors report for a complete list of CommonLine loans that have failed the loan validation processes.

For CRC loans, the online loan validation process is made available; click the Validate Loan button to initiate the Loan Validation process for that specific loan. This option is not available for CL 4 loans. If a loan contains separate subsidized and unsubsidized records, you must validate each one.

Reviewing CommonLine Loan Status Information

Access the Loan Status Summary Information page (click the Loan Status Summary link on any page in the Originate Loan component).

Loan Status Summary Information			
Student Eligibility			
Loan Type Cd:	STAF	Total Certified Loan Amt	4000.00 10/02/2004
Origination Detail Find View All First 1 of 1 Last			
Item Type:	Fed Stfd Loan-Unsubsidized	Certified Amount:	\$4,000.00
Loan Process Status:	Origination Pending	Transmission Status:	Orig Pending Transmission
Loan Action Code:	Loan Originated	Action Status:	Failed 10/02/2004
Disbursement Information Customize Find View All Grid First 1-2 of 2 Last			
<div> Actions Amounts Payment </div>			
Disbursement ID	Action Code	Action Status	Status Date
01	Anticipated Disbursement	Pending	10/02/04 9:37:01AM
02	Anticipated Disbursement	Pending	10/02/04 9:37:01AM

Loan Status Summary Information page: Actions tab

Use this page at various stages of the loan origination process, including after origination, after validation, after disbursements, and after information from the loan servicer has been processed.

Student Eligibility

Total Certified Loan Amt (total certified loan amount) Displays the total amount certified including both subsidized and unsubsidized item types used for the same origination record.

Origination Detail

Loan Process Status Displays the overall status of the loan. Used in conjunction with the Transmission Status. Values are:

Origination Pending: Loan has been originated or reset due to a loan rejection, and waiting loan validation.

In Service: Indicates the loan has been transmitted to the appropriate servicer.

Terminated: Indicates that a pre-guarantee loan cancellation has been initiated.

Hold: The loan is on hold and the system suspends all loan processing until the hold is removed.

Canceled: A loan cancellation has been initiated.

Loan Action Code Displays the most recent origination level action taken on the loan.

Transmission Status Displays the current status of the loan in relation to the loan servicer. Used in conjunction with the loan process status to know the overall status of the loan. Values are:

Accepted: Indicates the servicer has accepted the loan.

Change Pending Transmission: Indicates an adjustment generated a change transaction that has not been sent to the servicer.

Error: Not used for CommonLine loans.

Origination Pending Transmission: Indicates an Origination that has not been transmitted to the servicer.

Transmitted: Indicates that an origination or change transaction has been sent to the loan servicer.

Action Status Displays the status of the loan action code.

Disbursement Information

Shows the most recent actions performed on the individual loan disbursements.

Disbursement ID Indicates the disbursement number of the selected loan and the disbursement sequence.

Action Status Displays the status and date of the most recent action.

Amounts Tab

Select the Amounts tab.

Loan Status Summary Information				
Student Eligibility				
Loan Type Cd:	STAF	Total Certified Loan Amt	4000.00	10/02/2004
Origination Detail Find View All First 1 of 1 Last				
Item Type:	Fed Stfd Loan-Unsubsidized	Certified Amount:	\$4,000.00	
Loan Process Status:	Origination Pending	Transmission Status:	Orig Pending Transmission	
Loan Action Code:	Loan Originated	Action Status:	Failed	10/02/2004
Disbursement Information Customize Find View All First 1-2 of 2 Last				
<div> Actions Amounts Payment </div>				
<u>Disbursement ID</u>	<u>Disbursement Amount</u>	<u>Loan Fees</u>	<u>Net Disbursement</u>	<u>Disb Hold/Release Status</u>
01	\$2,000.00	\$79.40	\$1,920.60	Hold
02	\$2,000.00	\$79.40	\$1,920.60	Hold

Loan Status Summary Information page: Amounts tab

View the calculated loan disbursement amounts.

Payment Tab

Select the Payment tab.

Loan Status Summary Information				
Student Eligibility				
Loan Type Cd:	STAF	Total Certified Loan Amt	4000.00	10/02/2004
Origination Detail Find View All First 1 of 1 Last				
Item Type:	Fed Stfd Loan-Unsubsidized	Certified Amount:	\$4,000.00	
Loan Process Status:	Origination Pending	Transmission Status:	Orig Pending Transmission	
Loan Action Code:	Loan Originated	Action Status:	Failed	10/02/2004
Disbursement Information Customize Find View All First 1-2 of 2 Last				
<div> Actions Amounts Payment </div>				
<u>Disbursement ID</u>	<u>Net Amount Received</u>	<u>Actual Amount Disbursed</u>	<u>Disbursement Date</u>	<u>Disbursement Hold</u>
01				
02				N

Loan Status Summary Information page: Payment tab

View actual disbursement amounts received by the school and paid to the student's account.

Managing Loan Origination Transmission Data

This section discusses how to:

- View a student's originated loans.
- View loan application summary.
- View loan origination information.
- View loan origination change.
- View loan period change.
- Override loan origination transmission data.

Pages Used to Manage CommonLine Loan Origination Transmission Data

Page Name	Definition Name	Navigation	Usage
Origination Student Summary	LOAN_ORIG_SUMM	Financial Aid, Loans, View Originated Loans, Origination Student Summary	View a student's originated loans for a selected aid year.

Page Name	Definition Name	Navigation	Usage
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Click the Appl Data link on the Origination Student Summary page.	View one originated loan for a student in a particular aid year.
Loan Origination Information	LOAN_ORIG_SEC	Click the Origination Status link on the Loan Application Summary page.	View loan level actions that monitor the progress of the loan application.
Origination Loan Disbursement	LOAN_DISBURSEMENT	Click the Disbursement Status link on the Loan Application Summary page.	Review activity related to each disbursement record for a student's loan.
Loan Origination Change	LN_CL_ORIG_CHG_SEC	Click the Change link on the Loan Origination Information page.	When you run adjustments, view the type of loan change record or the changes that occurred.
Loan Period Change	LN_CL_ORIG_CHG_07	Click the Change link on the Loan Origination Change page.	View the change information that is sent to the loan servicer.
Loan Action Message Detail	LOAN_ORIGACTN_SEC	Click the Message link on the Loan Origination Information page.	View any change error messages received on the CommonLine application response record that generated the origination action.
CommonLine Loan Origination Transmission	LOAN_ORIG_TRANS	Financial Aid, Loans, CommonLine Management, Override Loan Status, CommonLine Loan Origination Transmission	Manually update loan status values to synchronize with the loan servicers. Can be used to manually approve or deny a loan record.

Viewing a Student's Originated Loans

Access the Origination Student Summary page (Financial Aid, Loans, View Originated Loans, Origination Student Summary).

Origination Student Summary

DAVIS,RICARDO

ID: FASSLNS028

Aid Year: 2007 Financial Aid Year 2006 - 2007

Institution: PSUNV

							Find View All	First	1-2 of 2	Last
Career	Loan Type		App Seq	Loan Cert Dt	Cert Amt	Loan Start	Loan End			
UGRD	FFEL	FFEL Stafford (Qtr)	1	03/28/2006	\$6,625.00	09/06/2006	06/05/2007	Appl Data		
UGRD	PKN2	Perkins - 376	1	03/28/2006	\$4,000.00	09/06/2006	06/05/2007	Appl Data		

Origination Student Summary page

Appl Data(application data) Click to open the Loan Application Summary page.

Viewing Loan Application Summary

Access the Loan Application Summary page (click the Appl Data link on the Origination Student Summary page).

Loan Application Summary

Khoa Li

ID: FA0728

Aid Year: 2005 Financial Aid Year 2004-2005

Institution: PSUNV

[Student Loan Summary](#)

Career	Loan Type		Appl Seq	Loan Cert Dt	Total Cert Amt	LnAmt Borr	Start Date	End Date
UGRD	STAF	FFEL Stafford - Sems	1	06/19/2004	\$3,625.00	\$3,625.00	08/30/2004	05/08/2005

Origination Detail							Find View All	First	1-2 of 2	Last
Item Type:		900000000304 Subsidized	Origination Amount Detail:			\$2,625.00	Origination Status			
		Fed Stfd Loan-Subsidized	Borrower Requested Amt:			\$2,625.00				
Ln App ID:		0013150000AD74004	Remaining Loan Eligibility:			\$0	Disbursement Status			
Item Type:		900000000305 Unsub	Origination Amount Detail:			\$1,000.00	Origination Status			
		Fed Stfd Loan-Unsubsidized	Borrower Requested Amt:			\$1,000.00				
Ln App ID:		0013150000AD74004	Remaining Loan Eligibility:			\$0	Disbursement Status			

Loan Application Summary page

LnAmt Borr (loan amount borrowed)	Displays the actual amount the student has borrowed.
Loan Start and Loan End	Displays the loan period dates.
Remaining Loan Eligibility	The difference between the origination amount detail and the borrower requested amount.
Student Loan Summary	Click to access the Origination Student Summary page.
Origination Status	Click to access the Loan Origination Information page.
Disbursement Status	Click to access the Origination Loan Disbursement page.

Viewing Loan Origination Information

Access the Loan Origination Information page (click the Origination Status link on the Loan Application Summary page).

Loan Origination Information

Item Type: 900000000378 Subsidized Stafford - Quarter
Ln App ID: 0013150000A6PU003 **Loan Certified Amount:** \$2,625.00

[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Detail | **Detail 2** |

Sequence	Action Code	Status	Status Date
1	O	Loan Originated	Pending
			03/28/2006

Loan Origination Information page: Detail tab

The page displays loan level activity. The action rows are displayed in reverse chronological order so that the most recent changes appear on top.

Action Code Loan action codes are predefined and delivered with the system to indicate actions performed on the loan.

Note. The Change and Message links are available only when a change or message is associated with the record. Links are available to view the CRC status codes and the corresponding CRC staging table information for the selected loan action row.

See [Chapter 36, "Processing CommonLine Loans," Processing Loan Changes, page 1349.](#)

Detail 2 Tab

Select the Detail 2 tab.

Loan Origination Information				
Item Type:	900000000378 Subsidized Stafford - Quarter			
Ln App ID:	0013150000A6PU003	Loan Certified Amount:	\$2,625.00	
Customize Find View All First 1 of 1 Last				
<div> Detail Detail 2 </div>				
Transfer Batch	Phase Code		User ID	Process Instance
			SAMPLE	389

Loan Origination Information page: Detail 2 tab

Use to view secondary loan action information.

Transfer Batch Indicates the ID for the specific batch in which the loan was transmitted or received. CommonLine 4 loans only.

User ID Indicates the person who ran the process that inserted the loan action code.

Process Instance Indicates the unique ID of the process that posted the loan action message on the page. You can use this on the Messages page to select the instance.

Viewing Loan Origination Change

Access the Loan Origination Change page (click the Change link on the Loan Origination Information page).

Loan Origination Change		
Sequence:	3 Orig Change	10/02/2004 3:33:56PM
Customize Find View All First 1 of 1 Last		
Loan Change Record Type		Change Status
Loan Period Change (07)	Change	Ready

Loan Origination Change page

This page is only available for approved loans that have been adjusted by the loan origination process.

Change Click to access the Loan Period Change page. This link is active if additional change information exists.

Message This link, if active, enables you to view any errors reported by the loan servicer when the change record is processed.

Change Status

Displays status of the change record type. Change status values are:

Ready: The change record type is ready to be transmitted.

Pending: Additional action is required before the change record type can be transmitted. This status only occurs with Change Record Types 11 and 12.

Accepted: The change transaction has been received and approved by the loan servicer.

Error: The change transaction sent to the loan servicer has not been approved. The Message link is active to enable you to view change errors.

Note. This page varies depending on the loan change record type.

Viewing Loan Period Change

Access the Loan Period Change page (click the Change link on the Loan Origination Change page).

Loan Period Change	
Change Sequence:	1 Loan Period Change (07)
Revised Loan Period Begin Date:	08/25/2003
Revised Loan Period End Date:	10/15/2004
Grade Level Code:	
Anticipated Completion Date:	
Change Certification Date:	10/02/2004

Loan Period Change page

This page is only available for approved loans that have been adjusted by the loan origination process. In this example, the system displays the fields changed for the Loan Period Change (07) record. The system displays a different page for each of the following change record types:

- Loan Period Change (07)
- Ln (Loan) Cancellation/Reinstatement (08)
- Loan Increase (24)

Note. Change record types 11, 12, 13, and 14 are not supported.

Overriding Loan Origination Transmission Data

Access the CommonLine Loan Origination Transmission page (Financial Aid, Loans, CommonLine Management, Override Loan Status, CommonLine Loan Origination Transmission).

CommonLine Loan Origination Transmission

ID: FA0728 **Li,Khoa D** **Institution:** PSUNV
Career: UGRD Undergraduate **Aid Year:** 2005
Loan Type: STAF FFEL Stafford - Sems **Appl Seq:** 1 [Loan Status Summary](#)

Find First 1 of 2 Last

☐ Accept Orig
 ☐ Error Loan
 ☐ Hold Loan
 ☐ Remove Hold
 [Update Status](#)

Item Type		Offer Amount	Accept Amount	Loan Processing Stat:	Orig Trans Stat:
900000000304	ORIGINATED	\$2625.00	\$2625.00	In Service	Accepted
Detail	ACKNOWLEDGED	\$2625.00	\$2625.00	Ln App ID:	001315000AD74004

Find | View All First 1-2 of 2 Last

Disbursement ID		Offer Balance	Accept Balance	Net Disb Bal
01	ORIGINATED	\$1313.00	\$1313.00	\$1261.00
Detail	ACKNOWLEDGED	\$1313.00	\$1313.00	\$1261.00
02	ORIGINATED	\$1312.00	\$1312.00	\$1261.00
Detail	ACKNOWLEDGED	\$1312.00	\$1312.00	\$1261.00

CommonLine Loan Origination Transmission page

Use this page to override loan status information. You should only override the status of an originated loan in cases where the processing of loans using the automated processes cannot process the loan properly. Overriding loan information should be done with a clear understanding of the purpose and expected result from overriding the loan status. New problems can be created for the loan if information is changed without performing correct analysis.

Note. Because this page enables you to change important financial eligibility information, access should be restricted to users with the appropriate security access.

Accept Orig (accept origination)

When you select this option and click Update Status, you accept current originated and adjusted loan amounts. The transmitted fields are filled with the same amount as the originated fields. The system generates a new origination action code of *PSMA* (manually accepted). This is the same as receiving a CommonLine application response file where the student's loan is reported guaranteed or a CommonLine application response file in response to a CommonLine change transaction. This action also manually releases a loan from error status. The loan is eligible for loan adjustment processing as long as the process level is not set to *M* (manual).

Error Loan

When you select this option and click Update Status, the system manually rejects the loan by generating a new origination action code of *PSMR* (manually rejected). The system then resets the loan to a pending status. This enables you to correct the reason for the manual rejection and re-originate the loan.

Note. If you are rejecting a loan because the borrower is no longer eligible, you must adjust the student's package to reflect the change in eligibility.

Hold Loan

When you select this option and click the Update Status button, the system changes the Loan Processing Stat (loan processing status) field to *Hold*.

Remove Hold

When you select this option and click the Update Status button, the system resets the Loan Processing Stat (loan processing status) field to *In Service*.

The loan processing status and origination transmission status values are updated when a manual action is initiated.

Accept Origination Value Changes

Original Loan Processing Stat Value	Original Orig Trans Stat Value	New Loan Processing Stat Value	New Orig Trans Stat Value
Origination Pending	Origination Pending	In Service	Accepted
In Service	Transmitted (not previously accepted)	In Service	Accepted
In Service	Change Pending	In Service	Accepted
In Service	Transmitted (previously accepted)	In Service	Accepted
Cancelled	Change Pending	In Service	Accepted
Cancelled	Transmitted	In Service	Accepted

Error Value Changes

Original Loan Processing Stat Value	Original Orig Trans Stat Value	New Loan Processing Stat Value	New Orig Trans Stat Value
Origination Pending	Origination Pending	Origination Pending	Origination Pending
In Service	Transmitted (not previously accepted)	Origination Pending	Origination Pending
In Service	Change Pending	In Service	Error
In Service	Transmitted (previously accepted)	In Service	Error

See Also

Chapter 36, "Processing CommonLine Loans," Reviewing Loans on Hold, page 1343

Viewing Loan Disbursement Activity

This section provides common elements and discusses how to:

- Review loan disbursement activity.
- Review loan disbursement actions.
- Review loan disbursement changes.
- Review cancelled and reinstated loans.
- Review loan award disbursement information.
- Review loan award transmission status.

Pages Used to View Loan Disbursement Activity

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Origination Loan Disbursement	LOAN_DISBURSEMENT	Financial Aid, Loans, View Disbursement Status, Origination Loan Disbursement	Review activity related to each disbursement record for a student's loan including current payment information.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Click the Appl Data link on the Origination Student Summary page.	View one originated loan for a student in a particular aid year.
Loan Disbursement Action	LOAN_DISBACTN_SEC	Click the Detail link on the Origination Loan Disbursement page.	Review secondary loan disbursement action information.
Loan Disbursement Change	LN_CL_DISB_CHG_SEC	Click the Disbursement Action Detail button on the Loan Disbursement page.	Review loan disbursement level changes of transaction record type that was calculated by the loan adjustment program.
Cancel/Reinstate Loan	LN_CL_DISB_CHG_09 LN_CL_DISB_CHG_10	Click the Change link on the Loan Disbursement Change page.	View the disbursement related change record information.

Page Name	Definition Name	Navigation	Usage
Disbursement Message Information	LOAN_DISB_MSG_SEC	Click the Message link on the Loan Disbursement page.	View loan disbursement error messages received on the CommonLine change response record.
Loan Award Disbursement Inquiry	LN_AWRD_DISB_INQ	Financial Aid, Loans, View Award Disbursements, Loan Award Disbursement Inquiry	Review loan disbursement information as it relates to the student's packaged loan awards.
Loan Transmission Status	LOAN_ORIG_TRNS_INQ	Financial Aid, Loans, CommonLine Management, Loan Transmission Information, Loan Transmission Status	Review loan award transmission status as well as all loan and disbursement level activity.

Reviewing Loan Disbursement Activity

Access the Origination Loan Disbursement page (click the Disbursement Status link on the Loan Application Summary page).

Origination Loan Disbursement						
ID:	FA0721	Amanda Smith	Return to Application			
Loan Type:	STAF	FFEL Stafford - Sems	Academic Career:	UGRD		
Item Type:	900000000304	Fed Stfd Loan-Subsidized	Application Seq Number:	1		
Ln App ID:	0013150000AD74001	Subsidized	Loan Certified Amount:	\$2,625.00		
Disbursement Information						
					Find	First 1 of 2 Last
Disb ID	Disb Amt	Net Disb	Percentage	Loan Paid	Loan Paid Date	H/R Stat
01	\$1313.00	\$1261.00	50.00 %	Not Paid		R Detail
Disbursement Actions						
					Customize Find View All	First 1-2 of 2 Last
Sequence	Description	Status		Status Date	Loan Action Dttm	
2	Adjusted Disbursement	Pending	Change	10/02/2004	10/02/2004 3:33:56PM	
1	Anticipated Disbursement	Pending		06/19/2004	06/19/2004 11:14:21AM	

Origination Loan Disbursement page

Disbursement Information

Percentage Indicates the percentage of the total loan award the disbursement represents.

Loan Paid Indicates whether the first disbursement has been credited to the student's account in Student Financials.

H/R Stat (hold/release status) Indicates whether the disbursement is on hold (*H*) or release (*R*) status.

Disbursement Actions

As changes to the disbursement occur, a new row of disbursement information is inserted. The information is sorted in reverse chronological order so that the most recent action appears first.

Sequence Displays the most recent action.

Return to Application Click to access the Loan Application Summary page.

Detail Click to access the Loan Disbursement Action page to view secondary disbursement action data.

Change Click to view the disbursement level CommonLine 4 Change transaction record type that is required to be sent to the loan servicer.

Message Click to view loan disbursement error messages received.

Note. The Change and Message links are available only when a change or message is associated with the record.

Reviewing Loan Disbursement Actions

Access the Loan Disbursement Action page (click the Detail link on the Origination Loan Disbursement page).

Loan Disbursement Action						
Disbursement ID:	01	Loan Disbursement Amt:	\$1313.00	Net Loan Disbursement:	\$1261.00	Percentage: 50.00 %
Find View All First 1 of 1 Last						
Disbursement Action						
Seq Nbr:	1	06/19/2004 12:01:41PM	Actn Amt:	Actn Net:	Actn Fee:	Actn Adj:
Action Code:	Anticipatd		\$1313.00	\$1261.00	\$52.00	\$0.00
Action Status:	Pending	06/19/2004	Transfer Batch:			
Trading Partner Amounts						
Svcr Actual Orig Fee:	\$0.00	Svcr Actual Guar Fee:		\$0.00		

Loan Disbursement Action page

View secondary disbursement action information.

Loan Disbursement Amt (loan disbursement amount)	Displays the gross loan amount. This is the same value that displays on the parent page.
Net Loan Disbursement	Displays the net loan amount after fees are subtracted. This is the same value that displays on the parent page.
Seq Nbr (sequence number)	Displays the sequence number of the disbursement action. This is the same value that displays on the parent page. You can view all disbursement actions by pressing the View All link.
Action Code	Displays a code that represents a disbursement action message.
Actn Amt (action amount)	Displays the gross disbursement amount.
Actn Net (action net)	Displays the net disbursement amount after subtracting fees.
Actn Fee (action fee)	Displays the loan fee amount for the disbursement.
Actn Adj (action adjustment)	Displays the adjusted disbursement amount reported. This field is only populated if applicable.
Transfer Batch	Displays the number generated by the institution to uniquely identify a specific batch of records.

Reviewing Loan Disbursement Changes

Access the Loan Disbursement Change page (click the Disbursement Action Detail button on the Loan Disbursement page).

This page is only available for approved loans that have been adjusted by the loan origination process.

Change Click to access the Cancel/Reinstate Loan page and view any errors reported by the loan servicers when the change record is processed.

Message Click to access the Disbursement Message Information page and view disbursement related change information that is sent to the loan servicer.

See Also

Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Change, page 1301

Reviewing Cancelled and Reinstated Loans

Access the Cancel/Reinstate Loan page (click the Change link on the Loan Disbursement Change page).

Cancel/Reinstate Loan

Change Sequence:

1

Pre Disbursement Change (09)

Disbursement ID:

01

Cancel Amount:

Cancellation Date:

Rev Disb Amount:

1750.00

Rev Disb Date:

08/11/2000

Hold/Release:

Release

☐ Reinstatement Indicator Code

Cancel/Reinstate Loan page

In this example, the system displays the fields changed for the 09 record. The system displays a different page for each of the following change record types:

- Pre Disbursement Change (09)
- Post Disbursement Change (10)

Reviewing Loan Award Disbursement Information

Access the Loan Award Disbursement Inquiry page (Financial Aid, Loans, View Award Disbursements, Loan Award Disbursement Inquiry).

Loan Award Disbursement Inquiry					
Khoa Li		ID: FA0728			
Aid Year: 2005		Financial Aid Year 2004-2005		Institution: PSUNV	
Find First 1 of 2 Last					
Item Type	900000000304	Fed Stfd Loan-Subsidized		Offered:	\$2625.00
Award Status:	Accepted	Disbursement Plan:	Two Semst	Career:	UGRD
				Accepted:	\$2625.00
Find First 1 of 2 Last					
Disbursement ID:	01	Disbursed Balance:		Offer Balance:	\$1313.00
	Fall	Net Disb Balance:	\$1261.00	Accept Balance:	\$1313.00
Find View All First 1 of 1 Last					
Loan Disbursements (by Application)					
Appl Seq:	1	Dsb Actl:	0.00	Loan Refund ID:	FA0728
Loan Type:	STAF	Net Disb:	0.00	Loan Refund Indicator:	Borrower
			06/19/04 12:01:41PM		

Loan Award Disbursement Inquiry page

Use the upper scroll area to view the student's different loan awards. This information is derived from the Award Summary component.

Award Status	Displays the current status of the student's loan item type from the Award Summary page.
Disbursement Plan	Displays the disbursement distribution rule applied when the loan item type is awarded to the student.
Offered and Accepted	Indicates the current offered and accepted loan amounts in the student's award summary.

Use the middle scroll area to view the status of each disbursement for the loan award. This information is derived from the disbursement level information on the Award Summary component.

Disbursed Balance	Displays the disbursement amount that has been applied to the student's financial account.
Net Disbursed Balance	Displays the net balance of the disbursement amount calculated at the time the loan was awarded to the student.

The section in the lowermost scroll area displays loan disbursement information for any loans originated for the loan item type shown in the upper scroll areas.

Loan Refund ID (loan refund ID)	Displays the ID of the person who receives any refunds on the loan. Student Financials uses this ID to generate refund checks.
--	--

Loan Refund Indicator Displays the person who receives any refunds on the loan. Values are *Student* and *Borrower*.

Reviewing Loan Award Transmission Status

Access the Loan Transmission Status page (Financial Aid, Loans, CommonLine Management, Loan Transmission Information, Loan Transmission Status).

Loan Transmission Status

ID:	FAASG003	Test3,Student	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2008	
Loan Type:	STAF	FFEL Stafford - Sems	Appl Seq:	1	

[Loan Status Summary](#)

Item Type	900000000304	Sub Staff - Sem	Loan Interest Attribute:	Subsidized
------------------	--------------	-----------------	---------------------------------	------------

	Offer Amount	Accept Amount	Orig Trans Stat	Ln Proc Stat	
ORIGINATED	\$2625.00	\$2625.00	Orig Pend	Orig Pend	Detail
ACKNOWLEDGED	\$0.00	\$0.00			

Disbursement ID	Offer Balance	Accept Balance	Net Disb Bal	
01 ORIGINATED	\$1313.00	\$1313.00	\$1261.00	Detail
ACKNOWLEDGED	\$0.00	\$0.00	\$0.00	
02 ORIGINATED	\$1312.00	\$1312.00	\$1261.00	Detail
ACKNOWLEDGED	\$0.00	\$0.00	\$0.00	

Loan Transmission Status page

Loan Status Summary Click this link to access the Loan Status Summary Information page.

Processing CRC Loan Files

This section discusses how to select validated CRC outbound files to move to CRC staging tables.

Pages Used to Process CRC Loan Files

Page Name	Definition Name	Navigation	Usage
Process CRC Outbound Records	SFA_RUNCTL_CRC_OUT	Financial Aid, File Management, CommonLine Loans, Process CRC Outbound Records	Select and process validated loans to the CRC staging tables. Create XML outbound files for transmission to the loan servicers.
CRC Document	SFA_CRC_DOCUMENT	Financial Aid, File Management, CommonLine Loans, View CRC Application Records, CRC Document	View CRC Document level information for all application records generated by the CRC Outbound Staging process, as well as all application response records received from the loan servicers.
Financial Summary	SFA_CRC_FIN_SUM	Click the Financial Summary link on the CRC Document page.	Review net disbursement, EFT disbursement, non EFT disbursement, cancellation, reissue, and deficit amount.
Document Response	SFA_CRC_DOC_RSP	Click the Response Information link on the CRC Document page.	Review response error code, message, and report value.
CRC School Information	SFA_CRC_ATT SCHL	Financial Aid, File Management, CommonLine Loans, View CRC Application Records, CRC School Information	Review attended school ID, attending school branch ID, and response code.
Attended School Response	SFA_CRC_ATTEND_RSP	Click the Response Information link on the CRC School Information page.	Review response error code, message, and report value.
CRC Student	SFA_CRC_STUDENT	Financial Aid, File Management, CommonLine Loans, View CRC Application Records, CRC Student	View student information (name, SSN, date of birth, driver's license, citizenship status, residency, and email address).
Student Response	SFA_CRC_STU_RSP	Click the Response Information link on the CRC Student page.	Review student response, error, message, and reported value.
Student Address	SFA_CRC_ADDRESS	Click the Address Information link on the CRC Student page.	Review the student's address information.

Page Name	Definition Name	Navigation	Usage
Phone Information	SFA_CRC_PHONE	Click the Phone Number Information link on the CRC Student page.	Review telephone information.
Employment Information	SFA_CRC_EMP_INFO	Click the Employment Information link on the CRC Student page.	Review employment type, position, years at employer, address, and telephone information.
Financial Data	SFA_CRC_FIN_DATA	Click the Financial Data Information link on the CRC Student page.	Review salary, other income, credit card and house payment, and other payments and debt.
CRC Award	SFA_CRC_AWARD	Financial Aid, File Management, CommonLine Loans, View CRC Application Records, CRC Award	Review award type, award amount, and promissory note, guarantor, and lender status information.
Loan Information	SFA_CRC_LN_INFO	Click the Loan Information link on the CRC Award page.	Review award dates, EFC, academic program, enrollment status information, and various codes and indicators.
Signature Information	SFA_CRC_LN_SIGN	Click the Signature Information link on the Loan Information page.	Review signature date, source code, and electronic signature information.
Guarantor/Lender Information	SFA_CRC_LN_LNDR	Click the Guarantor/Lender link on the Loan Information page.	Review lender and guarantor IDs.
Loan Information Response	SFA_CRC_LN_RSP	Click the Response Information link on the Loan Information page.	Review response error, message, and reported value.
Unique Data	SFA_CRC_UNQ_DATA	Click the Unique Data link on the CRC Award page.	Review additional miscellaneous information.
Student Award Response	SFA_CRC_AWD_RSP	Click the Response Information link on the CRC Award page.	Review student award response error, message, and total value.
CRC Disbursement	SFA_CRC_DISB	Financial Aid, File Management, CommonLine Loans, View CRC Application Records, CRC Disbursement	Review disbursement information.

Page Name	Definition Name	Navigation	Usage
Disbursement Response	SFA_CRC_DSB_RSP	Click the Response Information link on the CRC Disbursement page.	Review disbursement response error, message, and reported value.

Selecting Validated CRC Loan Records to Outbound

Access the Process CRC Outbound Records page (Financial Aid, File Management, CommonLine Loans, Process CRC Outbound Records).

Process CRC Outbound Records

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Selection Criteria

Find | View All First 1 of 1 Last

*Academic Institution:

PSUNV PeopleSoft University

*Aid Year:

2008 2007-2008

*School Code:

001315 PeopleSoft

Schema Version:

1.2.0

☒ Orig Outbound

☐ Orig Change Outbound

Process CRC Outbound Records page

This page controls one or both processes used for generating CRC XML files:

- CRC outbound staging (FAPCLOUT) process, a COBOL SQL process
- CRC XML outbound (SFA_CRC_OUT) process, an Application Engine process to generate the XML files.

Note. The processes are not defined to run in sequence. Use the Process Scheduler to create a job definition if you want to run the processes in sequence.

Orig Outbound (origination outbound) Select to gather all pending origination records for the specified institution, aid year, and school code.

Orig Change Outbound (origination change outbound) Select to gather all pending origination change records for the specified institution, aid year, and school code.

Demographic Changes This option is only available when you select the Orig Change Outbound check box. Select to have address, phone, and email information evaluated and modified information submitted in the change transaction record. Use this option if you have changed address, phone, or email address information and then calculated a change transaction for the loan.

Creating CL 4 Loan Files

After you have originated and validated your FFELP and alternative loans, you create the files to send to the loan destination.

This section provides an overview and discusses how to:

- Select validated CL 4 loan files to outbound.
- Generate CL 4 files to transmit.
- Rename CommonLine 4 files.

Pages Used to Create CL 4 Loan Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process CL 4 Outbound Files	RUNCTL_CLOUT	Financial Aid, File Management, CommonLine Loans, Process CL 4 Outbound Records, Process CL 4 Outbound Files	Select and process validated CommonLine 4 loans and load them into EDI Manager staging tables.
Run Parameters	EC_RUN_OUTBOUND_01	Financial Aid, File Management, CommonLine Loans, Outbound EC Agent, Run Parameters	Generate files from the data in the EDI Manager staging tables.
Rename EDI Outbound File	RUNCTL_RENAME	Financial Aid, File Management, CommonLine Loans, Rename Outbound Files, Rename EDI Outbound File	Rename one or more CL 4 files to a standard naming convention before transmitting to loan servicers.

Selecting Validated CL 4 Loan Files to Outbound

Access the Process CL 4 Outbound Files page (Financial Aid, File Management, CommonLine Loans, Process CL 4 Outbound Records, Process CL 4 Outbound Files).

Process CL 4 Outbound Files

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

Selection Criteria

Find | View All

First 1-2 of 2 Last

*Institution:

PSUNV PeopleSoft University

*Aid Year:

2008 2007-2008

*School Code:

001315 PeopleSoft

*Version:

CommonLine 4

☒ Orig Outbound

☐ Orig Change Outbound

PSUNV PeopleSoft University

2008 2007-2008

001315 PeopleSoft

*Version:

CommonLine 4

☒ Orig Outbound

☐ Orig Change Outbound

Process CL 4 Outbound Files page

Insert rows to add additional institution, aid year, school code, and version combinations for the CommonLine 4 Outbound (FAPLCOD4) process, a COBOL SQL process.

- Version


Select CommonLine 4.
- Orig Outbound
(origination outbound)

Select to gather all pending origination records for the specified institution, aid year, and school code.
- Orig Change Outbound
(origination change outbound)

Select to gather all pending origination change records for the specified institution, aid year, and school code.

Generating CL 4 Loan Files to Transmit

Access the Run Parameters page (Financial Aid, File Management, CommonLine Loans, Outbound EC Agent, Run Parameters).

Run Parameters	
Run Control ID: 1	Report Manager Process Monitor Run
Outbound Agent Run Parameters	
<input checked="" type="checkbox"/> EC Trans ID	A004P 
<input type="checkbox"/> Business Unit	
<input type="checkbox"/> Vendor/Customer	
Outbound File Options	
<input type="checkbox"/> Suppress EC 999 Record	<input type="checkbox"/> Suppress Rowid
<input type="checkbox"/> Keep Queue Status	<input type="checkbox"/> Message Header/Footer
<input type="checkbox"/> Comma Separated Format	<input type="checkbox"/> Single Document File
	<input type="checkbox"/> Separate Output Flag

Run Parameters page

Outbound Agent Run Parameters

Before running this process for the first time, confirm that your technical staff has run the EC Prep process to generate a current ecoutmap.sqc file. The mapping in this file is used by the system to correctly format the outbound files. If the ecoutmap file is not created, the system may generate empty files.

The EC Prep process is run from PeopleTools, EDI Manager, Monitor EDI Processing, Prepare Outbound Driver.

EC Trans ID (electronic commerce transaction identification) Select this check box. The EC transaction ID uses the same name as the message class. You must run this process separately for each EC transaction ID. The following transaction IDs are available:

A004P: CommonLine 4 application send record.

C004P: CommonLine 4 change transaction send record.

Business Unit Not used for loan processing.

Vendor/Customer Select to create files only for the loan destination number you enter.

Outbound File Options

Suppress EC 999 Record This option controls whether loan files are generated with or without the 999 row at the beginning of the file. If you plan to use the Rename EDI Outbound File process, clear this option to allow the required 999 row to be generated.

Separate Output Flag

You should check this option to prevent multiple individual files for the same loan destination from becoming concatenated into a single superfile. Loan servicers might not accept superfiles. Check with your loan servicers to determine whether you should use this option.

Renaming CommonLine 4 Files

Access the Rename EDI Outbound File page (Financial Aid, File Management, CommonLine Loans, Rename Outbound Files, Rename EDI Outbound File).

Rename EDI Outbound File

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Find | View All First 1 of 1 Last

EC Profile ID:

*Input Directory:

*Output Destination:

Active Switch ☒

Use External Trading PartnerID ☐ Rename Processed Records? ☒

Rename EDI Outbound File page

Use this page to rename files to match the naming standards of your guarantor or lender.

Reviewing and Managing CRC XML Files

Two components assist in the management of generated and loaded CRC XML files.

This section discusses how to:

- View CRC loan file transactions.
- Monitor CRC award load status.

Pages Used to Review and Manage CRC XML Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CRC Document Management	SFA_CRC_FILE_REV	Financial Aid, File Management, CommonLine Loans, CRC Document Management	Review generated XML files, outbound to stage files, XML loaded to stage files, or XML processed files.
CRC Award Management	SFA_CRC_LOAD	Financial Aid, File Management, CommonLine Loans, CRC Award Management	View process status and loan information.
Loan Status Codes	SFA_CRC_AWD_ST_SEC	Click the Loan Status Codes link on the CRC Award Management page.	View loan status codes and descriptions.

Viewing CRC Loan File Transactions

Access the CRC Document Management page (Financial Aid, File Management, CommonLine Loans, CRC Document Management).

CRC Document Management

Filter by Processing Status Outbound to Stage

Document Info Transmission Info Process Info Override				
	Processing Status	Update Processing Status	Document Type	Document ID
1	Outbound to Stage	Update Processing Status	Request	2004-09-03T08:21:38.54
2	Outbound to Stage	Update Processing Status	Request	2004-09-03T08:21:38.54
3	Outbound to Stage	Update Processing Status	Request	2004-09-03T08:21:38.54

CRC Document Management page: Document Info tab

This page displays information for all CRC loan files loaded in the CRC staging tables. Each row in the grid represents an XML document (file). You can view documents generated by the system and documents received from the loan servicers on this page. Use the component to monitor and control the processing of CRC XML files. This is similar to the EC Queue Review component used for CommonLine 4.

Filter by Process Status The page is designed to view only CRC documents of a specific process status. The process status is the current state of the XML document. Select from:

Generated XML: Loan request documents generated by the CRC Outbound process where the XML file has already been created.

Outbound to Stage: Loan request documents generated by the CRC Outbound process where the XML file has not yet been created.

XML Loaded to Stage: Loan response documents received from the loan servicers and recently loaded into the staging tables that have not yet been processed by the CRC Inbound process.

XML Processed: Loan response documents received from the loan servicers, loaded into the staging tables that have already been processed by the CRC Inbound process.

Processing Status Displays the processing status.

Update Processing Status Click to update the processing status. Use as the Update Status button in the EC Queue Review page for CommonLine 4 loans. For rows with document type request, you can modify the processing status between *Generated XML* and *Outbound to Stage*. You can modify the processing status to regenerate an XML file or to prevent a file from being created.

For rows with document type response, you can modify the processing status between *XML Loaded to Stage* and *XML Processed*. You can set the status to *XML Processed* to prevent the file from being processed by the CRC Inbound.

Document Type Indicates a request (outbound) or response (inbound) file.

Document ID Displays the unique identifier of the file. Sometimes referred to as the CommonLine Batch ID.

Transmission Info Tab

Select the Transmission Info tab.

CRC Document Management

Filter by Processing Status XML Loaded to Stage

Customize | Find |

First 1-3 of 3 Last

Document Info

Transmission Info

Process Info

Override

	Source Name	Destination Name	Destination ID
1	Sallie Mae - LSC Texas	PEOPLESFT UNIVERSITY	00131500
2	Sallie Mae - LSC Texas	PEOPLESFT UNIVERSITY	00131500
3	Texas Guaranteed Student Loan	PEOPLESFT UNIVERSITY	00131500

CRC Document Management page: Transmission Info tab

View the source and recipient of the CRC documents on this page.

Process Info Tab

Select the Process Info tab to view when the CRC document was loaded or created.

CRC Document Management

Filter by Processing Status XML Loaded to Stage

Document InfoTransmission InfoProcess InfoOverride

CustomizeFindFirst1-3 of 3Last

	Created Date & Time	Outbound DateTime	Inbound DateTime
1	2004-07-26T15:57:08.47		09/03/04 9:27AM
2	2004-07-30T15:57:08.47		09/03/04 9:31AM
3	2004-08-01T16:01:08.47		09/03/04 9:31AM

CRC Document Management page: Process Info tab

The fields indicate when the CRC document was created and when the document file was loaded into the staging tables (Response) or when the XML file was created (Request).

Override Tab

Select the Override tab.

CRC Document Management

Filter by Processing Status Outbound to Stage

Document InfoTransmission InfoProcess InfoOverride

CustomizeFind1-2 of 2FirstLast

	File Path
1	\\ENC-CRCSERV\DESTINATION\936
2	\\ENC-CRCSERV\DESTINATION\706

CRC Document Management page: Override tab

When a document row has a processing status of *Outbound to Stage*, the File Path field can be edited. This allows you to correct the physical destination of the outgoing XML file that is generated.

Monitoring CRC Award Load Status

Access the CRC Award Management page (Financial Aid, File Management, CommonLine Loans, CRC Award Management).

CRC Award Management					
Filter by Award Status: Processing Complete					
<div> Customize Find </div> <div> First 1-5 of 5 Last </div>					
<div> <div>Process Status</div> <div>Loan Information</div> <div></div> </div>					
	School Assigned Student Id	Award Type	Award Status	Error Reason	Document ID
1	FA0721	FFELPSubsidized	Processing Complete	No Errors	2004-07-26T15:57:08.47
2	FA0739	FFELPSubsidized	Processing Complete	No Errors	2004-08-01T16:01:08.47
3	FA0739	FFELPUnsubsidized	Processing Complete	No Errors	2004-08-01T16:01:08.47
4	FA0739	FFELPSubsidized	Processing Complete	No Errors	2004-09-19T16:01:08.47
5	FA0739	FFELPUnsubsidized	Processing Complete	No Errors	2004-09-19T16:01:08.47

CRC Award Management page: Process Status tab

Use this page to monitor the status of XML response files that have been loaded into the database. In particular, monitor those response records that have not yet been loaded or have an error status after the CRC Inbound process has been run.

Filter by Award Status Select the award status for filtering loan award records. Award status values are:

Error: The record failed to be processed. Check the error reason.

Processing Complete: The record was successfully processed and the loan has been updated.

Skipped Record: Manually set by the user to indicate that the record should no longer be processed.

Unprocessed: Initial value assigned when the record is first loaded into the staging tables.

Award Status The values are: *Error, Processing Complete, Skipped Record, and Unprocessed.*

Error Reason

The following are descriptions of why the award record has an error status. The values are:

Award Disbursement Discrepancy

Loan Certification Rqst (loan certification request)

Destination Not Found

Processing Error

Loan On Hold

Loan Not Found

No Errors

Process Not Supported

Source Data Corruption

Loan Tolerance Amt Exceeded (loan tolerance amount exceeded)

Unknown or Invalid Loan Type

Uninitiated Change

See [Chapter 36, "Processing CommonLine Loans," Reviewing CL 4 Status and Phase Codes, page 1336.](#)

Loan Information Tab

Select the Loan Information tab.

CRC Award Management				
Filter by Award Status: <input type="text" value="Processing Complete"/>				
<div> Customize Find </div> <div> First 1-5 of 5 Last </div>				
<div> Process Status Loan Information </div>				
	Attended School ID	Award Amount	Loan Status Codes	View Record
1	00131500	3500.00	Loan Status Codes	View Record
2	00131500	8500.00	Loan Status Codes	View Record
3	00131500	10000.00	Loan Status Codes	View Record
4	00131500	8500.00	Loan Status Codes	View Record
5	00131500	10000.00	Loan Status Codes	View Record

CRC Award Management page: Loan Information tab

Loan Status Codes

Click to review the guarantor, lender, promissory note, and credit status codes.

View Record

Click to access the CRC inquiry pages to view the complete application record that was received.

Reviewing and Managing CL 4 Loan Files

As you run the EDI Manager processes to either create or load CommonLine 4 files into the system, the system generates high level information that you can review in the EC Queue Review component.

This section discusses how to view CommonLine 4 EC queue records.

Page Used to Review and Manage CL 4 Loan Files

Page Name	Definition Name	Navigation	Usage
EC Queue Review (electronic commerce queue review)	FA_LN_EDT_ECQUEUE	Financial Aid, File Management, CommonLine Loans, Review CL 4 File Transactions, EC Queue Review	Review files that were either created (outbound) or loaded (inbound) by EDI Manager.

Viewing CL 4 EC Queue Records

Access the EC Queue Review page (Financial Aid, File Management, CommonLine Loans, Review CL 4 File Transactions, EC Queue Review).

EC Queue Review						
Loan EC Queue Records						
Customize Find View All First 1-3 of 3 Last						
File Status Information						
In/Out	Trans ID	Queue Inst	EC Queue Status	Update Status	EC Driver Datetime	EC Queue Control Number
O	A004P	1	Processed	Update Status		4P072004501
O	A004P	2	Processed	Update Status		4P072204501
O	A004P	3	Processed	Update Status		4P081604401

EC Queue Review page: File Status Information tab

This page displays information for all loan files processed by EDI Manager in the selected loan type. Use this component to verify the status of each file, control the processing of files, and diagnose EDI Manager problems.

Trans ID (transmission identification) Displays the EDI Manager map name. For CommonLine 4, the system uses the file ID. This is also part of the search record for the component so that you can select only the files types you want to see. The values are:

A004P: Application Send

C004P: Change Transaction Send

R004P: Application Response

E004P: EFT roster

EC Driver DateTime
(electronic commerce driver date time)

Displays the date and time that the inbound EC agent process loaded the file into the staging tables for inbound files.

Displays the date and time the outbound EC agent created the loan file for outbound files.

EC Queue Control Number (electronic commerce queue control number)

Displays the file batch ID for outbound loan files. For inbound loan files, the system displays the file source name.

Update Status

Click to change the EC Queue status value. The EC Queue Status informs you of the state of the file represented by each row in the grid.



A value of *Loaded* indicates that for incoming files the system has loaded the file into the staging tables, but the data in the file has not been completely processed. For outgoing files, this indicates that the system moved the application files into the staging tables, but the physical file has not yet been created.

A value of *Processed* indicates that for incoming files the system resolved all of the records in the file, and the file should no longer be processed. For outgoing files, this indicates that the system created physical files and no further processing is required.

Use the Update Status button to exercise special control over your loan files. For example, you can regenerate outbound files that may have become lost by changing the status from *Processed* to *Loaded*. The regenerated file is identical to the one lost. To control the order in which multiple loaded files are processed, change the status from *Loaded* to *Processed* to prevent the system from processing the file. Then update the status back to *Loaded* when you want the file to be processed.

Bus Unit/Cust/Vndr Info Tab

Select the Bus Unit/Cust/Vndr Info tab.

EC Queue Review						
Loan EC Queue Records						
File Status Information				Customize Find View All  First 1-3 of 3 Last		
Bus Unit/Cust/Vndr Info 						
In/Out	Trans ID	Queue Inst	Business Unit	EC BU Cd	Cust/Vndr	EC Ext Cd
O	A004P	1	FABU	FATP	6	LDST
O	A004P	2	FABU	FATP	6	LDST
O	A004P	3	FABU	FATP	6	LDST

EC Queue Review page: Bus Unit/Cust/Vndr Info tab

Business Unit

For outbound files only. The EC entity code used to represent the business unit responsible for the loan. This value corresponds with the loan transfer ID page setup information for the transaction ID value.

EC BU Cd (electronic commerce business unit code)

For outbound files only. Indicates the EC entity code that represents the greater university. This value corresponds with the loan transfer ID page setup information for the transaction ID value.

Cust/Vndr
(customer/vendor)

For outbound files only. The loan destination profile ID.

EC Ext Cd (electronic commerce external code)

For outbound files only. Indicates the EC entity code that represents the external loan entities. This value corresponds with the loan transfer ID page setup information for the transaction ID value.

Note. For outgoing files, if the business unit, EC BU Cd, Cust/Vndr, and EC Ext Cd fields are blank, this means that the Loan Transfer ID setting have not yet been created. Files cannot be created until this setup is completed each year for CommonLine 4 loans.

Receiving and Processing CRC Inbound Files

This section provides an overview of CFC disbursement files and discusses how to:

- Load CRC inbound files to staging tables.
- View CRC inbound details.
- Process CRC inbound files from staging tables to application tables.

Understanding CRC Disbursement Files

The system supports loading both CRC disbursement roster and disbursement forecast roster files into the database. The system loads disbursement forecast files into the staging tables but not to the application tables. You can create reports to identify potential disbursement problems before you receive the subsequent disbursement roster file.

For the system to load the disbursement roster record into the application tables, the record must match an existing originated loan record. The records must match by unique CommonLine loan ID, loan type, and disbursement number fields. The system does not verify that the disbursement amounts match. Depending on the disbursement method indicated for each disbursement record, the posting is of a disbursement action row with a distinct loan action code.

Pages Used to Receive and Process CRC Inbound Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load CRC XML Files	SFA_RUNCTL_CRC_IN	Financial Aid, File Management, CommonLine Loans, Inbound CRC XML Files, Load CRC XML Files	Load CRC application response files into staging tables.

Page Name	Definition Name	Navigation	Usage
CRC Student	SFA_CRC_STUDENT	Financial Aid, File Management, CommonLine Loans, View CRC Staging Table Records, CRC Student	View the CRC data loaded into staging tables.
Inbound CRC Files	SFA_RUNCTL_CRC_IN2	Financial Aid, File Management, CommonLine Loans, Process CRC Inbound Files, Inbound CRC Files	Move files into the database.

Loading CRC Inbound Files to Staging Tables

Access the Load CRC XML Files page (Financial Aid, File Management, CommonLine Loans, Inbound CRC XML Files, Load CRC XML Files).

Load CRC XML Files

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

	*File Path and Name		
1	\\ENC-CRCSEVER\INBOUND\708.XML	+	-
2	\\ENC-CRCSEVER\INBOUND\803.XML	+	-
3	\\ENC-CRCSEVER\INBOUND\SLMA\618.XML	+	-

Load CRC XML Files page

Use this process to load Application Responses, Disbursement Rosters and Certification Requests. The program differentiates the CRC file type by the <DocumentTypeCode> XML tag found in the beginning of the files.

Enter the path and name of the CRC file you are loading. You can process multiple files by adding additional rows on the page.

Viewing CRC Inbound Details

Access the CRC Student page (Financial Aid, File Management, CommonLine Loans, View CRC Staging Table Records, CRC Student).

CRC Document		CRC School Information		CRC Student	CRC Award	CRC Person	D
Document ID	2005-05-01T10:41:27.85			Destination ID	706		
Student Id	FA0826			Attended School ID	00131500		
Identifiers							
SSN ID	462679999			Birthdate ID	1981-06-04		
Last Name ID	DEPECE						
Student Information							
SSN				Drivers License State			
Birthdate				Drivers License Number			
First Name	JULIANA			Citizenship Status	USCitizen		
Middle Initial				Alien Registration Number			
Last Name				Residency State Province Code			
Person ID	FA0826			Residency Established Date			
Email Upd Date				Response Code			
Email Address				Response Information			
Address Information		Phone Number Information		Employment Information		Financial Data Information	

CRC Student page

The following table lists the CommonLine 4 record status codes and the equivalent CRC loan status codes.

CommonLine Release 4 Record Status Code	CRC Guarantor Status Code	CRC Lender Status Code	CRC Promissory Note Status Code	CRC Credit Status Code
B (Guaranteed, pnote received)	40	45	60	Any
G (Guaranteed)	40	Any except 45	Any except 60	Any
or	40	45	Any except 60	Any
or	40	Any except 45	60	Any
T (Terminated)	35	Any	Any	Any
or	Any except 40	30	Any	Any
D (Denied-Rejected- Incomplete)	30	Any except 30	Any	Any
or	Any except 40, 35	25	Any	Any
P (Pending processing)	25	Any except 25, 30	Any	Any
or	Any except 40, 35, 30	20	Any	Any

CommonLine Release 4 Record Status Code	CRC Guarantor Status Code	CRC Lender Status Code	CRC Promissory Note Status Code	CRC Credit Status Code
A and I (In process)	Any combination of codes except for the ones reflected above signify an "in process" status			

Processing CRC Inbound Files from Staging Tables to Application Tables

Access the Inbound CRC Files page (Financial Aid, File Management, CommonLine Loans, Process CRC Inbound Files, Inbound CRC Files).

Inbound CRC Files

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)
Run

Selection Criteria

Find | View All

First 1 of 1 Last

☒ Application Response
☐ Disbursement Roster
☐ Certification Request

Inbound CRC Files page

- Application Response** Select to process response records from the staging table to the application table.
- Disbursement Roster** Select to process disbursement or EFT records from the staging table to the application table.
- Certification Request** Select to process certification request records from the staging table to the application table.

After running the CRC inbound process, review all award records that did not load. Use the CRC Award Management page to review the awards in error. Review the load error code table for information on the possible error codes and how to resolve the error condition.

Application Response File Processing

The CRC loan inbound process attempts to match the loan application response record in the staging tables to an originated loan in the application database by comparing the CommonLine loan application IDs. When a match is found, the process updates the loan status by converting the CRC guarantor, lender, promissory note, and credit status codes into the record status code field used in CommonLine 4.

Refer to the CommonLine 4 record status code table for additional information.

Disbursement Roster Processing

You can load CRC disbursement roster and disbursement roster files into the database. First, run the CRC XML Inbound process to load the information into the CRC staging tables. Next, run Process CRC Inbound to process the records into the application tables. The system does not load disbursement forecast files into the application tables. You can create reports to identify potential disbursement problems prior to the receipt of the subsequent disbursement roster file.

For the system to load the disbursement roster record into the application tables, the record must match an existing originated loan record. The records must match in the unique CommonLine loan ID, the loan type, and the disbursement number fields. The system does not perform a check to verify that the disbursement amounts match. Depending on the disbursement method indicated for each disbursement record, the posting is of a disbursement action row with a distinct loan action code.

The following table lists the action codes to use for various disbursement methods.

<i>If the Disbursement Method is:</i>	<i>Post a Loan Action Code of:</i>	<i>Can it be Disbursed to the Student's Account?</i>
EFT	D – EFT Disbursement Received	Yes
Master Check	M – Disb Received by Master Check	Yes
Individual Check	I – Paper Check Notification Rcvd	No
Netting	PSN – Disb Received via Netting	Yes
By Lender	PSDL – Direct Disbursement by Lender	No

Receiving and Processing CL4 Inbound Files

This section discusses how to:

- Load CL 4 inbound files to staging tables.
- View CL 4 inbound application response details.
- View CL 4 inbound EFT details.
- Process CL 4 inbound files from staging tables to application tables.

- Review CL 4 status and phase codes.

See Also

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, CommonLine 4 Version, NCHelp Common Record CommonLine Reference Manual

Pages Used to Receive and Process CommonLine Inbound Files

Page Name	Definition Name	Navigation	Usage
Run Control Parameters	EC_RUN_INBOUND_01	Financial Aid, File Management, CommonLine Loans, Inbound EC Agent, Run Control Parameters	Load inbound CommonLine 4 application response or EFT files into staging tables.
CommonLine 4 Import - Header	CL_IMP_HEAD4	Financial Aid, File Management, CommonLine Loans, View CL 4 Response Records, CommonLine 4 Import, Header	View the information in the CommonLine application response header record.
Application Detail	CL_IMP_MAIN4	Financial Aid, File Management, CommonLine Loans, View CL 4 Response Records, Application Detail	View inbound application details. This includes information about each record in the EDI Manager staging tables.
Borrower Perm Address (borrower permanent address)	SEC_IMP_ADDR	Click the Address link on the Application Detail page.	View borrower permanent address information.
EFT Information (electronic funds transfer information)	CL_EFT4_HEAD	Financial Aid, File Management, CommonLine Loans, View CL 4 EFT Records, EFT Information	View electronic funds transfer information to verify data loaded into the EDI Manager staging tables.
CommonLine Inbound	RUNCTL_CLIN	Financial Aid, File Management, CommonLine Loans, Process CL 4 Inbound Files, CommonLine Inbound	Move selected acknowledgment files from EDI Manager staging tables into the database.
Loan Actions Codes	LOAN_ACTNCD_TBL	Financial Aid, Loans, View Loan Action Codes	View CommonLine 4 status and phase codes.

Loading CL 4 Inbound Files to Staging Tables

Access the Run Control Parameters page (Financial Aid, File Management, CommonLine Loans, Inbound EC Agent, Run Control Parameters).

Run Control Parameters

Run Control ID: PS

Report Manager

Process Monitor

Run

Run Option

☐ File List Driven

☒ Single File

☐ Single Instance

Inbound Agent Parameters

Single File Path:

c:\flatdata\

Single File Name:

cl4appr.dat

Force Profile

☐ Do Not Force
(998 or 999 in file)

☒ Force with Map
Information (998)

☐ Force with Partner
Information (999)

Inbound Agent Forced Parameters

EC Map ID:

CL_APP_V4

EC Profile ID:

CL_DESTIN

EC Convert Profile ID:

COMMONLINE

File Options

☐ Suppress Rowid

☐ Comma
Separated
Format

Inbound EC Agent - Run Control Parameters page

Use this page to initiate the Inbound EC Agent process (ECIN0001), an SQR report, which loads information from application response or EFT files into staging tables.

Note. Do not make any changes in the File Options group box.

Run Option

- Single File

Select if only one file is to be loaded.
- File List Driven

Select if you have created a file list to be loaded. Enter the file list name and location. Refer to the following table for file names to use.
- Single Instance

Not used in Financial Aid.

Inbound Agent Parameters

- Single File Path

Enter the path where the file is located. The syntax varies based on your network environment.

Single File Name Enter the name of the file in this field.

Force Profile

Do Not Force ((998 or 999 in file) Select to not use inbound agent forced parameters.

Force with Map Information (998) Select to enter parameters necessary to load the loan files. The parameters include an EC map ID, profile ID, and convert file ID.

Force with Partner Information (999) Select to enter parameters necessary to load the loan files. The parameters include an external entity code, forced transaction ID, external trading partner ID, internal alias entity code, and an EC alias trading partner ID.

Inbound Agent Forced Parameters

EC Map ID Select an inbound ID file to load. CommonLine choices for particular file names and types. Values are:

CL_APP_V4: where file name is R004P and file type is CommonLine 4 application response file.

CL_EFT_V4: where file name is E004P and file type is CommonLine 4 EFT roster.

EC Profile ID Select *CL_DESTIN* for CommonLine loan files. You can also create your own profile ID with EDI Manager.

EC Convert Profile ID Select *COMMONLINE* to load inbound CommonLine files.

Viewing CL 4 Inbound Application Response Details

Access the Application Detail page (Financial Aid, File Management, CommonLine Loans, View CL 4 Response Records, Application Detail).

Header		Application Detail		Service Provider Detail		Certification Detail		Alternative Loans		Change Errors	
EC Transaction ID:		R004P		Inbound / Outbound Switch:		Inbound					
EC Queue Instance:		7									
CommonLine Batch ID:				4P032302202		Load Dttm:		04/05/2002 12:04:44PM			
Find View All First 1 of 6 Last											
Ln Nbr:	1	Load Status:	Processed	N No Errors							
Loan Type:	01	Record Status:	G Guaranteed	Status Date:		20020404					
		Phase Code:	AELN	Phase Code Date:		00000000					
Loan Unique Id:	00131500010001137	Seq Num:	01	Address							
Borr First Name:	MICHAEL	Mid Init:	C	SSN:		303-15-1858					
Borr Last Name:	PRINCE			DOB:		19780530					
Amt Req:	999999	Citizen Cd:	N	SD	DL Nbr:	503151891					
Borr St Res:	000000	Defer:		Int Ind:	EFT Athztn:						
Def/Ref:		Outstd Lns:		Sig Cd:	Sig Date:	00000000					

Application Detail page

Load Status

Indicates the load status of the record. Values are:

Processed: the record has been used to update the loan application record.

Unprocessed: the default status indicating that the record has been loaded into the staging tables, but the CL Inbound process has not been run.

Skipped: a value set manually to indicate that the record should not be processed.

Error: the CL inbound process could not successfully process the record. View the error reason text that displays next to the field.

Record Status

Displays the status of the loan reported by the loan servicer on the application response record. You can review the record status table for the complete list of valid values.

See [Chapter 36, "Processing CommonLine Loans," Reviewing CL 4 Status and Phase Codes, page 1336.](#)

Status Date

Displays the date the record status occurred. For example, the date when the loan was guaranteed.

Phase Code

Corresponds to field 133 on the application response detail record. This is a more detailed status code communicated between the lending agencies.

Phase Code Date

Displays the date the phase code became active.

DL Nbr (driver's license number)

Displays the borrower's driver's license number.

Borr St Res (borrower state residence)

Displays the date the borrower became a legal resident of the identified state.

Defer (deferment)	Indicates the authorization for the lender to defer repayment periods. The borrower requests to defer principal payments while attending school.
Int Ind (interest indicator)	Indicates whether the borrower intends to pay the interest on the unsubsidized Federal Stafford or Federal PLUS loan while in school and when the loan is in grace or deferment.
EFT Athztn (electronic funds transfer authorization)	Indicates that the borrower has authorized the school to transfer the loan proceeds received by EFT to the appropriate student account.
Def/Ref (default/refund)	Indicates whether the PLUS/alternative student is currently in default on a student loan or owes a refund on a federal grant.
Outstd Lns (outstanding loans)	Indicates whether the borrower has outstanding loans.
Sig Date (signature date)	Indicates the date the valid promissory note was signed.
Address	Click to access the Borrower Perm Address page to view borrower permanent address information.

Viewing CL 4 Inbound EFT Details

Access the EFT Information page (Financial Aid, File Management, CommonLine Loans, View CL 4 EFT Records, EFT Information).

Processing CL 4 Inbound Files from Staging Tables to Application Tables

Access the CommonLine Inbound page (Financial Aid, File Management, CommonLine Loans, Process CL 4 Inbound Files, CommonLine Inbound).

CommonLine Inbound

Run Control ID: PS

Report Manager

Process Monitor

Run

Selection Criteria

Find | View All

First1 of 1Last

*Version: CommonLine 4

☒ Application Resp.☐ EFT Load

CommonLine Inbound page

Use this page to run the CommonLine 4 Inbound Driver process, a COBOL SQL process.

- Application Resp**
(application response)

Select to process all CommonLine 4 application response records from the EDI Manager staging table into the application database.
- EFT Load**

Select to process electronic fund transfer records to the database. After EFT records have been processed, they automatically become eligible for disbursement to the student's account.

Reviewing CL 4 Status and Phase Codes

Access the Loan Action Codes page (Financial Aid, Loans, View Loan Action Codes).

The CommonLine 4 loan inbound process uses the CommonLine 4 ID to match the loan application response record in the staging tables to an originated loan in the application database. When a match is found, the process loads both the record status code field 2 on the application response detail record and the phase code field 133 on the application response detail loan origination action records. The record status code provides a high-level status of the loan, while the phase code provides a detailed status.

Note. You can view the record status codes and application phase codes on the Loan Action Codes page.

In addition to loan origination action codes, the system generates a disbursement action record if a change of status occurs for a specific disbursement. Fields 120, 121, 122, and 123 on the application response detail record indicate changes to the disbursements. If the inbound process cannot load the record, the system generates an error code. Review the load error code table for additional details.

Record Status Codes

The following table lists record status codes that are specific to CommonLine 4 loans.

Code	Description	Load Action
A	Initial processing successful. Guarantees or obtains guarantee upon receipt of the promissory note.	A loan origination action message is posted for the loan.
I	Initial processing successful. Pending further approval.	A loan origination action message is posted for the loan.
G	Guaranteed.	A loan origination action message is posted. The loan approved amounts, disbursement information, MPN, and additional CommonLine 4 information are updated.
B	Guaranteed. Promissory note received and approved for disbursement.	Same as G.
P	Pending processing. (Error resolution underway by sending organization.)	A loan origination action message is posted.
D	Denied/rejected/incomplete. No further processing unless school, borrower, or lender provides updated data.	A loan origination action indicating the reject is posted, along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
C	School certification requested for application.	Load errors. Use report to process manually.
M	Modification to previously reported guarantee.	Same as G.
N	Response to reprint request.	A loan origination action message is posted.
R	Response to transactions submitted in change transaction send file.	A loan origination action message is posted.
T	Termination record. No action required.	A loan origination action message is posted.

Application Loan Phase Codes

The following table lists application loan phase codes.

Code	Description	Load Action
ASCH	Received transmission from school.	A loan origination action message is posted.
RECA	Received application/promissory note. Has yet to be approved for disbursement.	A loan origination action message is posted.
AWPN	Received application. Awaiting promissory note.	A loan origination action message is posted.
AABI	Awaiting additional borrower information.	A loan origination action message is posted.
AAIG	Awaiting additional information from guarantor.	A loan origination action message is posted.
AAIL	Awaiting additional information from lender.	A loan origination action message is posted.
AAIN	Awaiting additional information.	A loan origination action message is posted.
AAIS	Awaiting additional information from school.	A loan origination action message is posted.
AINP	Processing for submission to guarantor.	A loan origination action message is posted.
ASGU	Submitted to guarantor.	A loan origination action message is posted.
AWCR	Awaiting credit approval.	A loan origination action message is posted.
CRED	Credit approved.	A loan origination action message is posted.
AELN	Approved by guarantor. Not dependent on credit check.	A loan origination action message is posted.
ADIS	Awaiting first disbursement.	A loan origination action message is posted.
PRNT	Application and promissory note has been printed and mailed.	A loan origination action message is posted.
DPRT	Reprint request denied.	A loan origination action message is posted.

Code	Description	Load Action
SERV	Servicing (first disbursement has been made).	A loan origination action message is posted.
RDCT	Reduced disbursement amount.	A loan origination action message is posted.
ALRJ	Rejected by lender.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
AGRJ	Rejected by guarantor.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
RJCT	Rejected due to processing problems.	A loan origination action indicating the reject is posted along with the error messages. The loan is set to Hold. A second loan origination action is posted to reset the loan to Originated/Pending.
ATEL	Completing telephone follow-up to resolve problems.	A loan origination action message is posted.
AXCP	Performing exception processing. Resolving special problems.	A loan origination action message is posted.
HOLD	Holding while resolving outstanding problems.	A loan origination action message is posted.
AREP	Reprocessing	A loan origination action message is posted.
ATRM	Terminated loans have been withdrawn or cancelled.	A loan origination action message is posted.

Inbound File Load Error Codes

The following table describes errors and how they can be resolved. Set error records that do not require resolution to *Skipped*. This action removes them from the CL 4 App Response Error report. These codes are common to both CL4 and CRC.

Code	Description	Error Resolution
A – Award Discrepancy	Gross disbursement amounts could not be synchronized. See "Understanding the Inbound File Process."	Repackage the student so that the gross amounts match. Note. Do not use the CommonLine Loan Orig Trans page to auto-accept the loan instead of repackaging the student. Because the application load process now automatically reconciles differences between the loan and the student awards, PeopleSoft no longer recommends this procedure.
C – Loan certification request	All loan certification request records produce errors.	Follow the documented school certification request processing procedures.
D – Loan Destination not found	The load process was unable to determine the loan destination profile of the guaranteed loan. This occurs when institutions originate loans without a lender specified.	Create a loan destination using the lender and guarantor information on the Application Response record.
E – Processing Error	Possible data corruption in the application tables. Refer to your systems administrator for assistance.	Check for missing PS_LOAN_ORIG_DTL records, missing PS_LOAN_DISB_ACTN rows, or a discrepancy between the number of disbursements in the student's award and the number of disbursements listed in the application response record.
H – Loan on hold	The record does not load because the originated loan is in Hold status.	Resolve the hold condition and remove the Hold status in the Originate Loan component.
L – Loan not found	The application response record could not be matched to an originated loan using the CommonLine ID values.	If the origination record exists, either manually change the school's loan application ID to match the CommonLine ID or get the loan agency to change the CommonLine ID to match loan application ID.
N – No Errors	Assigned when the loan response record is loaded successfully.	

Code	Description	Error Resolution
P – Process Not Supported	The CRC response file is a type not supported or recognized by the system	Set to skip.
S – Source Data Corruption	<p>Loan servicer information is incorrect. One of the following is true:</p> <ul style="list-style-type: none"> The application response record has a record status of B (guaranteed, promissory note received), G (guaranteed), M (modification to previously reported guarantee), or R (change response), and the sum of the net amount, loan fees, and fees paid does not match the gross amount for any disbursement for a guaranteed loan. The application response record has a record status of B or G, and the sum of the gross disbursement amounts does not equal the loan approved amount. The application response record for a combination Stafford loan, with a status other than G, does not have a sequence of 00 (field 25 on the CommonLine 4 application response file). 	<p>For the first, request a new application response file from your loan servicer where the loan disbursement information is now correct and the gross amount = (loan fees - fees paid) + net amount.</p> <p>For the second, request a new application response file from your loan servicer where the loan disbursement and approved amount information is now correct.</p> <p>For the third, request a new application response file from your loan servicer or manually fix and reprocess the file.</p>
U – Unknown or invalid loan type	An unknown or invalid CommonLine loan type is defined for the application response record. Only the CommonLine 4 defined loan type codes (field 17) are acceptable.	Ask the loan servicer to reissue the application response record with a corrected loan type code value.
X – Uninitiated Change	A response to an uninitiated change response to the student's loan was received.	Review the changes made to the loan and make the appropriate changes to the loan manually. This may require running loan origination adjustments and then manually accepting the change using the CommonLine Loan Orig Trans page.

After you resolve any load errors, rerun the CommonLine loan inbound process to reprocess any records set to Error.

Two CL 4 reports can assist you in processing of load errors: the CL 4 App Response Load Error report and the CL School Cert Request report.

Managing Loans on Hold

Loans that are rejected by the loan servicer are automatically placed on hold and must be reviewed by the user. Loans can also be placed on hold if a data integrity error exists during the CommonLine outbound process. At the discretion of the financial aid administrator, a loan can be placed on hold indefinitely until released by the administrator. Loans placed on hold are not selected for processing by the system until corrective action is performed and the hold status is manually removed from the loan. Run the CL Loans on Hold report to identify the loans which require review.

This section discusses how to:

- Review loans on hold.
- Review loan origination and loan action status.
- Review loan disbursement detail.

Note. You can also use the CommonLine Loan Orig Trans component to release loans on hold.

See Also

Chapter 36, "Processing CommonLine Loans," Managing Loan Origination Transmission Data, page 1297

Pages Used to Manage Loans on Hold

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Orig Status (loan origination status)	SFA_CRC_ORIG_STAT	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Orig Status	Hold and release loans in hold status and synchronize the data between your institution and loan destinations.
Hold Information	SFA_CRC_LN_HLD_SBP	Click the Hold Information link on the Loan Orig Status page.	View reason CRC loan placed on hold.
Origination Detail	LN_ORIG_TRANS_SEC	Click the Detail link in the Origination Detail group box on the Loan Origination Status page.	Review loan origination and loan action status detail.

Page Name	Definition Name	Navigation	Usage
Disbursement Detail	LN_DISB_TRANS_SEC	Click the Detail link on the Originated tab on the Loan Origination Status page.	Review loan disbursement detail.

Reviewing Loans on Hold

Access the Loan Orig Status page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Orig Status).

Loan Origination 2 | Loan Origination 3 | Loan Validation | **Loan Orig Status**

ID: FA0739 Korker,Real B Institution: PSUNV
 Career: GRAD Graduate Aid Year: 2005
 Loan Type: STAF FFEL Stafford - Sems Appl Seq: 1 [Loan Status Summary](#)

Manual Action

☐ Hold Loan ☐ Remove Hold [Hold Information](#) [Update Origination](#)

Origination Detail Find First 1 of 2 Last

Item Type		Offer Amount	Accept Amount	Ln Proc Stat:
900000000304 Detail	ORIGINATED	\$8500.00	\$8500.00	Hold
Loan Application ID	ACKNOWLEDGED	\$0.00	\$0.00	Orig Trans Stat: Orig Pend
0013990000AFZ4005				

[Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Originated | Acknowledged

Disbursement ID	Detail	Offer Balance	Accept Balance	Net Disb Balance
01	Detail	\$4250.00	\$4250.00	\$4081.00
02	Detail	\$4250.00	\$4250.00	\$4082.00

Loan Orig Status page: Originated tab

Loans placed on hold are identified with a Ln Proc Stat (Loan Processing Status) value of *Hold*.

Manual Action

Hold Loan When you select this option and click the Update Origination button, the system changes the Ln Proc Stat (loan processing status) field to *Hold*.

Remove Hold When you select this option and click the Update Origination button, the system resets the Ln Proc Stat field to *Orig Pending*.

Hold Information Click to view the hold reason. For CRC loans, the system activates this link if the loan is placed on hold.

Note. If you initiate or remove a hold, you must save changes before leaving the component. Do not remove a hold without also resolving the hold condition.

Originated Detail**Ln Proc Stat** (loan processing status)

Displays the current status of the originated loan. Values are:

Cancel: A loan origination application that was previously in service is now cancelled.

Hold: Holds all processing for any loan origination applications of this loan type. Applications can be placed on hold manually or from an incoming acknowledgment resulting in an error.

In Service: A loan origination application has been transmitted by the institution.

Orig: A loan origination application has been created by the institution.

Terminated: The loan origination application was terminated by the institution prior to moving to a status of *In Service*..

Orig Trans Stat (origination transmission status)

Displays transmission activity status for the loan origination. Values are:

Pending: A loan origination application has been created but not yet validated or transmitted.

Trans: The transmitted origination record has been converted to a flat file and sent to the lending institution.

Accepted: An origination acknowledgment has been received, indicating the loan is accepted.

Chg Pend: A financial adjustment change in award amount has been made, and the changes have been originated as an Origination Change record.

Error: The loan origination application has been returned with errors. This status sets the loan processing status to *Hold*.

Detail

Click to access the Origination Detail page and view more details about the loan origination and the loan action status.

Originated Tab**Detail**

Click to access the Disbursement Detail page and view information regarding the disbursement for the loan.

Acknowledged Tab

Select the Acknowledged tab.

Loan Origination 2 Loan Origination 3 Loan Validation Loan Orig Status			
ID:	FA0728	Li,Khoa D	Institution: PSUNV
Career:	UGRD	Undergraduate	Aid Year: 2005
Loan Type:	STAF	FFEL Stafford - Sems	Appl Seq: 1
Loan Status Summary			
Manual Action			
<input type="radio"/> Hold Loan		<input type="radio"/> Remove Hold	
		Hold Information	Update Origination
Origination Detail			
Find First 1 of 2 Last			
Item Type		Offer Amount	Accept Amount
900000000304 Detail	ORIGINATED	\$2625.00	\$2625.00
Loan Application ID	ACKNOWLEDGED	\$2625.00	\$2625.00
0013150000AD74004			
		Ln Proc Stat:	In Service
		Orig Trans Stat:	Accepted
Customize Find View All First 1-2 of 2 Last			
Originated Acknowledged			
Acknowledged Offer Balance		Acknowledged Accept Balance	
\$1313.00		\$1313.00	
\$1312.00		\$1261.00	
		\$1261.00	

Loan Orig Status page: Acknowledged tab

Use to view disbursement information received from the servicer.

Hold Action Value Changes

The loan processing status is updated when a hold is manually initiated.

<i>Original Ln Proc Stat Value</i>	<i>New Ln Proc Stat Value</i>
Offered	Offered (no change)
Terminated	Terminated (no change)
All other values	Hold

Hold Removal Value Changes

The system updates the loan processing and original transaction status when a hold is manually removed.

<i>Original Ln Proc Stat Value</i>	<i>Original Orig Trans Stat Value</i>	<i>New Ln Proc Stat Value</i>	<i>New Orig Trans Stat Value</i>
Hold	Accepted (Cert amount > 0)	In Service	Accepted

<i>Original Ln Proc Stat Value</i>	<i>Original Orig Trans Stat Value</i>	<i>New Ln Proc Stat Value</i>	<i>New Orig Trans Stat Value</i>
Hold	Accepted (Cert amount = 0)	Cancelled	Accepted
Hold	Error (Cert amount > 0)	In Service	Error
Hold	Error (Cert amount = 0)	Cancelled	Error
Hold	Transmitted (Cert amount > 0)	In Service	Transmitted
Hold	Transmitted (Cert amount = 0)	Cancelled	Transmitted
Hold	Change Pending (Cert amount > 0)	In Service	Change Pending
Hold	Change Pending (Cert amount = 0)	Cancelled	Change Pending
Hold	Originated	Originated	Originated

Reviewing Loan Origination and Loan Action Status

Access the Origination Detail page (click the [Detail](#) link in the Origination Detail group box on the Loan Origination Status page).

Origination Detail					
Item Type:	900000000304 Sub Staff - Sem				
Appl Seq:	1				
	ORIGINATED	ACKNOWLEDGED			
Offer Amount:	\$3500.00	\$3500.00			
Accept Amount:	\$3500.00	\$3500.00			
Loan Fee Amount:	\$142.46				
CURRENT APPLICATION					
Loan Certified Amount:	\$3500.00	\$3500.00			
Borrower Requested Amt:	\$3500.00	\$3500.00			
Loan Application ID:	0013150000AFZ4006				
Loan Actions Customize Find View 1 First 1-2 of 2 Last					
Action Status CRC Status					
Seq #	Action Code	Loan Action Dttm	Status	Phase Code	
2	G	Guaranteed	10/02/2004 12:09:22PM	Received	CRC
1	O	Loan Orig	10/02/2004 12:03:03PM	Transmittd	

Origination Detail page: Action Status tab

Use to review loan activity.

The system displays current application information and loan action status. The system calculates the amounts in the Originated column at the time the loan is originated. Values in the Acknowledged column are received from the loan servicer.

Action Status Tab

Seq # (sequence number) The origination action sequence is generated from the loan record activity. You can scroll to view each subsequent sequence for this loan. Click View All to view all origination actions that have occurred. For CommonLine 4 loans, the Phase Code field may be populated.

CRC Status Tab

Select the CRC Status tab.

Origination Detail				
Item Type:	9000000000304 Sub Staff - Sem			
Appl Seq:	1			
	ORIGINATED	ACKNOWLEDGED		
Offer Amount:	\$3500.00	\$3500.00		
Accept Amount:	\$3500.00	\$3500.00		
Loan Fee Amount:	\$142.46			
CURRENT APPLICATION				
Loan Certified Amount:	\$3500.00	\$3500.00		
Borrower Requested Amt:	\$3500.00	\$3500.00		
Loan Application ID:	0013150000AFZ4006			
Loan Actions Customize Find View 1 First 1-2 of 2 Last				
Action Status CRC Status				
Seq #	Lender Status	Guarantor Status	Pnote Status	Credit Status
2	45	40	20	
1				

Origination Detail page: CRC Status tab

The system displays the lender, guarantor, promissory note, and credit status codes for CRC loans. For a complete list of status codes and their meaning, use the CRC Loan Action Code Table. Access the table by selecting Set up SACR, Product Related, Financial Aid, Loans, CRC CommonLine, Maintain CRC Loan Status Codes.

Reviewing Loan Disbursement Detail

Access the Disbursement Detail page (click the Detail link on the Originated tab on the Loan Origination Status page).

Disbursement Detail		
Disbursement ID:	01	ORIGINATED
Offer Balance:	\$1750.00	ACKNOWLEDGED
Accept Balance:	\$1750.00	
Net Disb Balance:	\$1678.77	
CURRENT APPLICATION		
Loan Disbursement Amt:	\$1750.00	
Loan Fee Amount:	\$71.23	
Net Loan Disbursement:	\$1678.77	
Disb Hold/Release Status: Hold		
<div> Customize Find View All </div> <div> First 1-2 of 5 Last </div>		
Sequence	Action Code	Loan Action Dttm
1	5 PSDS	Disb Act
2	4 PSCD	Chk. Rec.
		Status
		Received
		Pending

Disbursement Detail page

Use to review the activity of the selected disbursement.

Sequence Indicates the disbursement sequence number. This is the sequence in which loan disbursement actions were generated.

Processing Loan Changes

The processes discussed in this section are for making changes for both CRC and CL4 unless indicated.

This section provides an overview of changes to originated loans and discusses how to:

- Change loan dates and student grade level.
- Change loan period start and end dates.
- Change the student's grade level and graduation date.
- Generate and view @1-07 loan adjustment information.
- Process cancellations and reinstatements.
- Process disbursement-level changes.
- Process loan increases.
- Process address, phone, and email address changes for CRC loans.

- Create change transaction files.
- Receive and process change application response files.
- Accept change transactions manually.

Understanding Changes to Originated Loans

The Campus Solutions system supports CommonLine change transaction processing for both versions of CommonLine, the newer Common Record CommonLine (CRC) and the older CommonLine 4 (CL 4). Changes to loan period, cancellations, reinstatements, reissues, and increases are supported. For CRC, changes to address, phone, and email are also supported. Most changes in loan eligibility result from changes to the student's award package, but changes to a loan might be required for loan period dates or anticipated graduation dates. You can make multiple changes to a single loan that generates multiple change transaction types at the same time. The loan origination process determines when changes occur and generates change transaction records to be sent to loan service providers.

When a change causes a paid disbursement to be reduced, the disbursement is suspended. Disbursed funds remain disbursed and must be reviewed, reconciled, and possibly returned to the lender. Increases in loan eligibility may result in either an increase in the existing loan award, or the creation of a new loan if the borrower's requested amount exceeds the promissory note amount.

The change business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4 is as follows.

1. Changes are made to the student's loan eligibility.
2. Run the Loan Origination process with the Adjustments option selected. The system identifies the adjustments and changes the loan origination status.
3. When origination is complete, run the Loan Validation process to check the loan application for data discrepancies. Loans that fail validation are reprocessed in subsequent runs until validation is reached.
4. Run the CommonLine Loan Outbound process to process validated loans into outbound staging tables.
5. Run the File Creation process to create loan change files using the staging table information. CRC generates files in XML format and CL 4 uses ASCII files.

After you submit the change files to the loan servicers, they are processed and you are notified using receipt of response files for each loan processed (discussed in a previous section). After receiving the CommonLine response file from your loan servicer as an acknowledgment of the change transaction, run the CommonLine Inbound processes to inbound and process the response records.

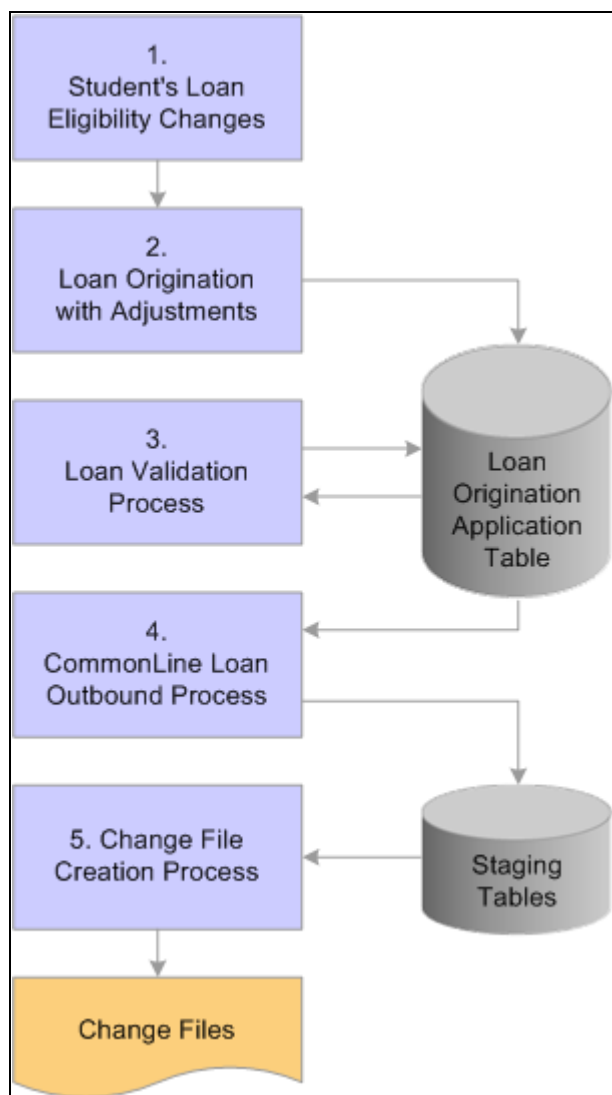
The CommonLine 4 change process involves loan level and disbursement level changes as affected by disbursement status:

- Loan level changes include:
 - Loan Period Change (@1-07)
 - Loan Cancellation/Reinstatement (@1-08)
 - Loan Increase (@1-24)

- Disbursement level changes include:
 - Disbursement Cancellation/Changes (@1-09)
 - Disbursement Notification/Change (@1-10)

Whether disbursements have already been made to the school can also determine the change record type. An adjustment made to a borrower's loan can result in a single change record or a combination of change records. Because the loan origination program makes these decisions automatically, understanding the types of change records generated by an adjustment to a borrower's loan eligibility is useful for resolving any change record problems with your service providers.

The following illustration shows the flow of CommonLine loan change processing.



The loan change outbound process.

See Also

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, CommonLine 4 Version

NCHelp Common Record CommonLine Reference Manual

Chapter 3, "Setting Up Financial Aid Terms," page 47

Chapter 36, "Processing CommonLine Loans," Updating Borrower Information, page 1279

Chapter 36, "Processing CommonLine Loans," Managing Loan Origination Transmission Data, page 1297

Chapter 36, "Processing CommonLine Loans," Processing Disbursement Level Changes, page 1359

Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1276

Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Information, page 1300

Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Change, page 1301

Chapter 36, "Processing CommonLine Loans," Viewing Loan Period Change, page 1302

Pages Used to Process CommonLine Loan Changes

Page Name	Definition Name	Navigation	Usage
Loan Origination 2	SFA_CRC_LN_ORIG_FN	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 2	Review and change loan start, end, certification, and scheduled disbursement dates. You can also hold loans or release loans from this page.
Loan Demographic Data	LOAN_ORIG_SEC2	Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 1 Click the Loan Demographic link on the Loan Origination 1 page.	Update academic level, NSLDS loan year or graduation date for student records that have been updated on the FA Term record.
Loan Period Change	CL_CHX_DTL107_SEC	Click the Detail 1-07 link on the Change Detail 2 page.	View 1-07 detail record information.
Loan Cancellation Loan Reinstatement	CL_CHX_DTL108_SEC	Click the Detail 1-08 link on the Change Detail 2 page.	View 1-08 detail record information.
Disbursement Cancellation/Change	CL_CHX_DTL109_SEC	Click the Detail 1-09 link on the Change Detail 2 page.	View 1-09 detail record information.

Page Name	Definition Name	Navigation	Usage
Disbursement Notification/Chng	CL_CHX_DTL110_SEC	Click the 1-10 button on the Change Detail 2 page.	View 1-10 detail record information.
Loan Increase Detail	CL_CHX_DTL124_SEC	Click the 1-24 button on the Change Detail 2 page.	View 1-24 detail record information.
Trailer	CL_CHX_TRAL4	Financial Aid, File Management, CommonLine Loans, View CL 4 Change Records, Trailer	View information contained in the trailer record for the CommonLine 4 change transaction send file.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Financial Aid, Loans, View Loan Application Status	View loan summary information and use links to access more detailed loan information.
Loan Origination Information	LOAN_ORIG_SEC	Financial Aid, Loans, View Loan Application Status. Click the Origination Status link on the Loan Application Summary page.	Determine whether the system has created a change transaction for the loan. View the CRC status codes and the corresponding CRC staging table information for the selected loan action row.
Origination Loan Disbursement	LOAN_DISBURSEMENT	Click the Disbursement Status link on the Loan Application Summary page.	Determine whether the system has created a disbursement level change transaction for the loan.
Loan Period Change	LN_CL_ORIG_CHG_07	Click the Change link on the Loan Origination Change page.	View 1-07 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.
Loan Cancellation/Reinstatement	LN_CL_ORIG_CHG_08	Click the Change link on the Loan Origination Change page.	View 1-08 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.
Cancel/Reinstate Loan	LN_CL_ORIG_CHG_09	Click the Change link on the Loan Disbursement Change page.	View 1-09 detail record information. This link or page is only available if a loan change has been processed in this category.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Post Disbursement Change	LN_CL_ORIG_CHG_10	Click the Change link on the Loan Disbursement Change page.	View 1-10 detail record information. This link or page is only available if a loan change has been processed in this category.
Loan Increase Change	LN_CL_ORIG_CHG_24	Click the Change link on the Loan Origination Change page.	View 1-24 detail record information and CRC Recipient ID. This link or page is only available if a loan change has been processed in this category.

Changing Loan Dates and Student Grade Level

You send information to loan agencies regarding changes to a borrower's loan period begin and end dates, student's grade level, and student's anticipated completion date through the transmission of the CommonLine 4 Change Transaction Loan Period Change @1-07 Detail record. This is a loan level adjustment. You can submit this loan change record before or after disbursement.

If you modify information in the Originate Loan component, the loan adjustment program automatically checks for changes to the student's program complete date (graduation date) and NSLDS loan year in the FA term record. You can then run the loan origination process with the Adjustments check box selected to generate an @1-07 change transaction record that reflects the changes.

To change the student's graduation date and NSLDS loan year without changing the loan award, or if you are not making other changes to the student's loan, follow the manual change processing instructions. You can use the Financial Aid Term component to change a student's graduation date and grade level.

Changes to the loan period start and end dates occur in the Originate Loan component. To change a student's graduation date, enter the expected graduation date. You can use the NSLDS Loan Year values to change the student's grade level.

Note. Changes to FA term information may require additional processing steps, such as running FA term build and student budget assignment.

After you change the expected graduation date and grade level for the appropriate FA term record, you must use the Originate Loan component to update any affected loan records. You can also change loan period begin and end dates in the component.

1. Click the Loan Demographic link to access the Loan Demographic Data page.
2. Select the Demo Chg (demo change) check box. Then select the changed term from the Termvalues.
3. Click the Update Term Data button. Note that the system displays any changes made to the FA Term record. Click OK to return to the Loan Origination I page. Save the Loan Origination 1 page.

See Also

[Chapter 3, "Setting Up Financial Aid Terms," page 47](#)

[Chapter 36, "Processing CommonLine Loans," Updating Borrower Information, page 1279](#)

[Chapter 36, "Processing CommonLine Loans," Managing Loan Origination Transmission Data, page 1297](#)

[Chapter 36, "Processing CommonLine Loans," Processing Disbursement Level Changes, page 1359](#)

[Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1276](#)

[Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Information, page 1300](#)

[Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Change, page 1301](#)

[Chapter 36, "Processing CommonLine Loans," Viewing Loan Period Change, page 1302](#)

Changing Loan Period Start and End Dates

Access the Loan Origination 2 page (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans, Loan Origination 2).

Loan Origination 1		Loan Origination 2		Loan Origination 3		Loan Validation		Loan Orig Status	
ID:	FASSLNS028	DAVIS,RICARDO	Institution:	PSUNV					
Career:	UGRD	Undergraduate	Aid Year:	2007					
Loan Type:	FFEL	FFEL Stafford (Qtr)	Appl Seq:	1	Loan Status Summary				
Loan Application Data									
Origination Total:	\$6,625.00		Loan Period Start:	09/06/2006		<input type="checkbox"/> Override Loan Dates			
			Loan Period End:	06/05/2007		Loan Certification Date:	03/28/2006		
Origination Detail Find View All First 1 of 2 Last									
Borrower Requested Amt:	\$2,625.00		Item Type:	9000000000378 Subsidized Stafford - Quarter					
Loan Certified Amount:	\$2,625.00		Loan Application ID:	0013150000A6PU003		Update ID			
Loan Approved Amount:	\$0.00		Anticipated Net Amount:	\$2,520.79		Anticipated Loan Fees:	\$104.21		
Customize Find View All First 1-3 of 3 Last									
<div> Disbursements Hold/Release Direct Disbursement </div>									
Disbursement ID	Request Date	Disbursement Amount	Net Disbursement						
01	08/23/2006	\$875.00	\$840.27						
02	12/20/2006	\$875.00	\$840.26						
03	03/14/2007	\$875.00	\$840.26						

Loan Origination 2 page: Disbursements tab

You send information to loan agencies regarding changes to a borrower's loan period dates through the transmission of the CommonLine 4 Change Transaction Loan Period Change @ 1-07 Detail record. This is a loan level adjustment. You can submit this loan change record before or after disbursement.

After you make changes to the loan dates or disbursement dates, save the page.

Override Loan Dates	Select this check box to make the date fields available for editing.
Loan Period Start and Loan Period End	Generated from the Valid Careers for Terms table. After changing the loan dates, save the page.

Disbursements

Use the Disbursements tab to change disbursement dates.

Request Date	Change the disbursement date.
---------------------	-------------------------------

Changing the Student's Grade Level and Graduation Date

To update the student's loan origination record to reflect the certain changes, first make the changes in the FA Term record. Before you can update the Academic Level, NSLDS Loan Year or Anticipated Completion Date fields on the loan origination record, you must first update in FA Term, then bring those changes into the student's loan origination record.

Note. Changes to FA term information can require additional processing steps, such as running FA term build and student budget assignment processes.

After updating the appropriate FA Term record, access the Loan Demographic Data page.

Loan Demographic Data - THIS APPLICATION ONLY -			
ID:	FASSLN8028	RICARDO DAVIS	Career: UGRD
Loan Type:	FFEL Stafford (Qtr)	Appl Seq: 1	<input checked="" type="checkbox"/> Demo Chg
Borrow Demographic Information			
Borrower ID:	FASSLN8028	RICARDO DAVIS	
Borrower SSN:	914-36-0028	Visa/Permit:	
Borrower Date of Birth:	07/01/1973	Citizenship:	Native
Driver's License #:	<input type="text"/>	<input type="text"/>	
Borr Default / Owes Refund:	<input type="text"/>		<input type="button" value="Update Borr Demo"/>
Term Information			
Completion Date:	08/14/2015	2015 SmQt	Term: <input type="text"/>
Loan Year:	1st Yr Prv	Academic Level:	Freshman
Direct Lending Year	<input type="text"/>	Academic Load:	Full-Time
			<input type="button" value="Update Term Data"/>
Student Demographic Information			
SSN:	914-36-0028	Citizenship:	Native
Birthdate:	07/01/1973	Visa/Permit:	
Depend Stat (Fed):	Independnt	Total Debt:	<input type="text"/> \$0
Stdnt Default / Owes Refund:	<input type="text"/>		<input type="button" value="Update Student Demo"/>

Loan Demographic Data page

When you finish making changes to this page, save the Loan Origination 1 page.

Demo Chg Select this check box to make the fields and buttons available for processing loan demographic changes.

Term information

Term Enter the term you changed in the FA Term record. This field is available when the Demo Chg check box is selected.

Update Term Data Click this button to pull in any changed information from the FA Term record into the loan origination application.

Generating and Viewing @1-07 Loan Adjustment Information

Access the Loan Period Change page (click the Detail 1-07 link on the Change Detail 2 page) .to view the Loan Period Change (07) changes that were recognized in loan origination. A Change Status value of *Ready* indicates that no other action is necessary to complete the loan period change transaction.

After you have saved your loan changes, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted.

The action code values OC (origination changed) and OX (origination cancelled) indicate adjustments have been made.

Processing Cancellations and Reinstatements

Access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package), manual award entry pages, or an award override page.

Loan cancellations and reinstatements (CommonLine Change @1-08 Detail record) are loan level adjustment changes that the system generates when you cancel or reinstate a loan before releasing the first disbursement. For reinstatements, if the lender has already processed the cancellation, the school can either fully or partially reinstate the loan. The cancellation or reinstatement change is initiated on the student's award package.

Canceling a Loan

To cancel a loan:

1. Click the Look Up Action button in the row of the loan that you want to cancel.
2. Select Cancel.
3. Press TAB to move out of the Action field.
4. Click the Validate button.
5. After validation is complete, click the Post button.

Reinstating a Loan

To reinstate a loan:

1. Click the Look Up Action button and select *Offer* or *Offer/Accept*.
2. Enter the amount of the loan reinstatement.
3. Click *Validate*.
4. After the validation is finished, click *Post*.

The system saves the information and updates the student award tables. The system processes a partial reinstatement if the amount is less than the original cancelled loan amount.

Note. For a loan reinstatement, you must use the same loan item type as the cancelled loan. If you add a new row and use a different loan item type, the system originates a new loan.

Generating and Viewing @1-08 Loan Change Information

After the loan changes have been made to the student's award package, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted.

The action code values OC (origination changed) and OX (origination cancelled) indicate adjustments. A successfully reinstated loan has an action code value of OC.

Access the Loan Cancellation/Reinstatement page to view the CommonLine Change @1-08 Detail changes that were recognized in loan origination. The system populates the Reinstated Loan Amount field based on the amount of the reinstatement. A Change Status value of *Ready* indicates that no other action is necessary to complete the loan period change transaction.

See Also

Chapter 28, "Awarding and Packaging Students," Using Auto Packaging and Auto Select Packaging, page 995

Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1276

Processing Disbursement Level Changes

Disbursement level changes occur when you make adjustments to individual disbursements of a guaranteed loan. Two types of CommonLine 4 change transaction record types communicate disbursement changes:

- CommonLine Change @1-09 Detail records (Disbursement Cancellation/Change)

The system generates the Disbursement Cancellation/Change @1-09 Detail record when you submit full or partial disbursement cancellations, reinstate previously cancelled disbursements, place disbursements on hold, place disbursements from hold to release status, and reschedule disbursement dates prior to the release of funds for the disbursement.

- CommonLine Change @1-10 Detail records (Disbursement Notification/Change)

The system generates the Disbursement Notification/Change @1-10 Detail record when you submit full or partial disbursement cancellations, reissue requests, and reinstatements after the release of funds for the disbursement.

The loan origination process automatically determines the type of disbursement level change transaction record based on whether the disbursement was received.

Disbursement Date Changes

Use the Loan Origination 2 page to adjust disbursement dates.

Note. You can only set disbursement dates equal to or after the current date. You cannot change a disbursement date to a past date.

Disbursement Hold and Release Changes

Use the Loan Origination 2 page to manually set individual loan disbursements to *Hold* or *Release*. You can also use the batch CommonLine Hold/Release process to automatically set the disbursement status for selected groups of disbursement records.

Note. To modify the process for setting hold/release status for your disbursements using Application Engine SQR, COBOL, and so on, set the PS_STDNT_AWARDS.OFFER_ACTIVITY_IND field to *A* for each employee ID that you change the PS_LOAN_DISBMNT.LN_HOLD_REL_STAT value to *H* (hold) or *R* (release). The PS_STDNT_AWARDS.OFFER_ACTIVITY_IND field is set automatically when you set the disbursement hold/release status online. It identifies a loan record as a potential change record.

Cancellations, Reinstatements, and Other Adjustments

You make disbursement date changes directly in the loan origination pages and all other disbursement changes on the awarding pages. Changes made to the student's loan disbursements on the award pages are recognized by the loan origination process and generate appropriate change transaction record types.

Changes to individual disbursements generally require changing split codes or the use of custom splits; this varies according to your institution's policies. Prior changes to a student's awards may require you to use the Award Entry/Manual or Award Override pages.

The following are examples of disbursement level changes:

- Canceling disbursements due to student non-enrollment.
- Reinstating previously canceled disbursements due to student re-enrollment.
- Decreasing a student's loan eligibility due to new funds awarded to the student.
- Increasing a student's loan eligibility due to the loss of expected financial aid awards.

Processing Post Disbursement Changes

When you reinstate a loan disbursement that has already been sent to the school by the disbursing agent, you must modify the original approved disbursement date before you can generate a post disbursement change transaction record.

The loan origination program also evaluates the status of the reinstated disbursement. If the school has already received a student's loan disbursement but has not yet applied the funds to the student's account, the system does not reinstate the disbursement until it either applies the funds to the student's account or returns them to the disbursing agent.

If either of the two conditions exists, the following error message 1021 appears in the Loan Origination message log:

The business rules established between your institution and your lending partners dictate the appropriate adjustment. To request a reissue and increase of the disbursement, adjust the disbursement date in the Originate Loan - Loan Origination 3 page before you run the loan origination process. Be sure to return the funds to the lender. Use the CommonLine Disbursement Maintenance page to document the return of funds.

Generating and Viewing @1-09 and @1-10 Loan Adjustment Information

After the loan changes have been made, run the loan origination process using the adjustments option. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted. The action code values of OC (origination changed) and OX (origination cancelled) indicate adjustments.

This is an example of loan change records calculated by the loan adjustment process (this example is specific to CL4).

- Access Financial Aid, Loans, View Disbursement Status, Origination Loan Disbursement. If a loan disbursement is adjusted or cancelled, the system displays a disbursement action message in the Description area. If the adjustment results in a CommonLine 4 change transaction record, the Change link is active.

- Click the Change link to open the Loan Disbursement Change page and view the type of CommonLine 4 change record that the system generates for the loan disbursement.
- Pre-Disbursement Charges:

The system generates the Pre-Disbursement Change (09) record type if the school has not yet received the disbursement. Access the Cancel/Reinstate Loan page to view the CommonLine Change @ 1–09 Detail changes. The Change Status of *Ready* indicates that no other action is necessary to complete the Loan Period Change transaction.

Click the active Change link to identify changes to the loan that require the system to create the Pre Disbursement Change (09) record type.

- Post-Disbursement Charges:

The system identifies the Post Disbursement Change (10) record type if the school has received the disbursement. Access the Post Disbursement Change page to view the CommonLine Change @ 1–10 Detail changes. The Change Status value of *Ready* indicates that no other action is necessary to complete the Loan Period Change transaction.

Click the active Change link to identify changes to the loan that require the system to create the Post Disbursement Change (10) record type

Although the loan adjustment process can calculate the amount of funds that must be returned to the lender, the school is responsible for initiating and completing the return of fund transactions. Running the CommonLine 4 EFT Reconciliation reports and the CRC EFT Discrepancy reports can identify post disbursement changes that require a return of funds. After the funds are returned to the lender or disbursing agent, update the returned amounts in the CommonLine Disbursement Maintenance page.

See Also

[Chapter 36, "Processing CommonLine Loans," Reviewing Loan Origination Information, page 1278](#)

[Chapter 36, "Processing CommonLine Loans," Understanding the Hold/Release Process, page 1365](#)

[Chapter 36, "Processing CommonLine Loans," Reviewing CommonLine Loan Status Information, page 1294](#)

[Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1276](#)

[Chapter 36, "Processing CommonLine Loans," Reviewing Loan Disbursement Actions, page 1307](#)

[Chapter 36, "Processing CommonLine Loans," Reviewing Loan Disbursement Changes, page 1308](#)

[Chapter 36, "Processing CommonLine Loans," Reviewing Cancelled and Reinstated Loans, page 1308](#)

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, CommonLine 4 Version

Processing Loan Increases

Loan increases, CommonLine Change @1-24 Detail records, are another type of loan level adjustment change. If the amount of the increase exceeds the borrower's promissory note requested amount, the system generates a new loan instead of an increase. You can view the promissory note requested amount on the Loan Origination 3 page in the Maintain Originated Loans component.

Increasing a Loan Amount

To increase a loan amount, access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package), manual award entry pages, or an award override page.

1. Click the Look Up Action button and select *Offer* or *Offer/Accept*
2. Enter the new increased amount of the loan
3. Click the Validate button.
4. When the validation is finished, click the Post button.

Note. Loan increase transactions are most likely to occur with alternative loans. This is due to the elimination of the loan requested amount from the FFELP promissory notes. For FFELP loans, in most cases, the system originates a new loan for additional increases in loan eligibility rather than a loan increase transaction.

Generating and Viewing @1-24 Loan Adjustment Information

After making changes to the loan awards, run the loan origination process with adjustments activated to process the changes. The loan origination process detects the changes and displays a new loan origination action row that indicates that the loan has been adjusted. The action code values of OC (origination changed) and OX (origination cancelled) indicate adjustments.

This is an example of loan change records calculated by the loan adjustment process.

1. Access the Loan Application Summary page (Financial Aid, Loans, View Loan Application Status).
2. Click the Origination Status link on the Loan Application Summary page to view the adjusted loan (Orig Change).

The Change link is active because this is a loan level change.

3. Click the Change link to open the Loan Origination Change page that indicates that the system generated the Loan Increase (24) record and is ready for transmission.
4. Click the Change link on the Loan Origination Change page to open the Loan Increase page. The page shows the changed information that you transmitted to the loan servicer.

Note. If a message is associated with the record, the system displays a message link because the loan servicer has not received the change record. The link becomes active if the servicer rejects the change record and provides error messages.

See Also

[Chapter 28, "Awarding and Packaging Students," Awarding Online, page 990](#)

[Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1276](#)

[Chapter 36, "Processing CommonLine Loans," Reviewing Loan Origination Information, page 1278](#)

[Chapter 36, "Processing CommonLine Loans," Processing Loan Changes, page 1349](#)

Processing Address, Phone, and Email Address Changes for CRC Loans

You have the option to submit address, phone, and email address changes for CRC change transactions. This option is part of the CRC Outbound process and functions only if you made another change and have calculated a change transaction for the loan. An address, phone, or email address change by itself does not trigger the system to generate a change transaction.

To process an address or phone change:

1. Make an address, phone, or email address change in Campus Community.
2. Make a change to the loan, such as loan period start and end dates.
3. Run the Process CRC Outbound Records process with the Orig Change Outbound and Demographic Changes options selected.

The CRC Outbound process determines whether this loan information has changed since the last time that you submitted information to the servicer. If so, the system submits the changed information in the change transaction record.

See Also

Chapter 36, "Processing CommonLine Loans," Selecting Validated CL 4 Loan Files to Outbound, page 1315

Creating Change Transaction Files

To generate CRC change transaction files or CommonLine 4 (C004P) change transaction files, use the same outbound processes used to generate application send files, but use different run control options. As with application send records, change records must be originated and validated before you create change transaction files.

This is the change transaction outbound procedure for CommonLine FFELP and alternative loans using either CRC or CL 4:

1. Make changes to the student's loan.
2. Run the Loan Origination process, using Adjustments, to detect changes made to the student's loan and calculate new loan eligibility. The calculated information is stored on the loan origination application tables.
3. Run the Loan Validation process to check the loan changes for data discrepancies. Loans failing validation are reprocessed in subsequent runs until validation is reached.
4. Run the CommonLine Loan Outbound process to process validated loans processed into outbound staging tables. Be sure to select the appropriate Outbound Change run control options.
5. Run the Change File Creation process to create loan application files using the staging table information. CRC generates files in XML format while CL 4 uses ASCII files.

After you submit the change files to the loan servicers, they are processed and you are notified using receipt of response files for each loan change processed.

See Also

Chapter 36, "Processing CommonLine Loans," Creating CL 4 Loan Files, page 1315

Receiving and Processing Change Application Response Files

After sending the loan change files to your loan servicers, you receive response files from the servicers to acknowledge the receipt of your changes and to report the status of each loan change record sent.

This is the inbound business processing flow for CommonLine FFELP and alternative loans using either CRC or CL 4:

1. School receives inbound loan files from loan servicers.
2. Run an inbound process to read the information from the files into the CommonLine staging tables.
3. When the information is in the staging tables, run the CommonLine loan inbound process.

This process takes information from the external loan record and updates the originated loan records in the database.

See Also

Chapter 36, "Processing CommonLine Loans," Loading CL 4 Inbound Files to Staging Tables, page 1332

Accepting Change Transactions Manually

To accept change transactions manually if your guarantor does not send a response record to update the system, use the CommonLine Loan Origination Transmission page (Financial Aid, Loans, CommonLine Management, Override Loan Status). It is important to ensure that your change transactions are resolved in the system to allow subsequent change transactions to take place automatically if the student's eligibility changes further.

See Also

Chapter 36, "Processing CommonLine Loans," Managing Loan Origination Transmission Data, page 1297

Managing Disbursement Hold and Release Processing

The system automatically selects and reviews pending CommonLine loan disbursements. If your institution participates in disbursement hold and release processing, you can use the Hold/Release process (FAPLCLHR) to determine whether disbursements should be released to your institution or held until your institution requests the funds.

This section provides an overview of the Hold/Release process, lists prerequisites, and discusses how to run the Set Hold/Release process.

Note. Disbursement hold and release processing is an optional business process supported by CommonLine. You must establish agreements with your loan servicers to participate.

See Also

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, CommonLine 4 Version

NCHelp CommonLine Network for FFELP and Alternative Loans Reference Manual, Common Record: CommonLine

Understanding the Hold/Release Process

The Set Hold/Release Flag process uses equations to evaluate a student's eligibility for loan disbursement and then sets the disbursement to be held or released. Disbursements from loan servicers that do not participate in hold and release processing are not evaluated. The equations evaluate changes in the student's load level and verify their satisfactory academic progress status.

Note. You can modify the delivered equations as necessary or create your own custom equations.

Records are selected for processing by using the run control settings. Using the delivered equations, each disbursement record is evaluated to meet the following criteria:

- The student's current calculated financial aid load is equal to the financial aid load set at the census date for the term the disbursement is intended.
- The student has a satisfactory academic progress status of *Meets SAP* or *Probation*.

If both conditions are true, the student is considered eligible for disbursement for the term and the disbursement hold/release status is set to *R* (release disbursement) if it was previously set to *H* (hold disbursement) on the Loan Orig CommonLine page.

If any condition is false, the student is considered ineligible and status for the disbursements is set to *H*.

After the system sets the disbursement hold/release status on loan disbursement records, the next time that you run the loan origination process with the adjustments option activated, CommonLine 4 @1-09 Change Transaction records are generated for each disbursement.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Working with Equation Engine"

Prerequisites

To use the CommonLine Hold/Release process, you must:

- Establish hold and release processing agreements with your loan servicers.

- Assign a default status of either Hold or Release for each eligible CommonLine 4 loan destination and No Support for nonparticipating loan destinations. The Set Hold/Release Flag process evaluates loan disbursements only when the Disbursement Hold/Release status is set to *Hold* or *Release*.
- If necessary, modify the hold and release equation delivered with the system to add additional eligibility criteria.

See Also

[Chapter 10, "Setting Up CommonLine 4 Loans," Defining CommonLine Options, page 315](#)

[Chapter 10, "Setting Up CommonLine 4 Loans," Selecting Equations for Hold and Release, page 312](#)

Equation Engine Programmer's Guide, PDF distributed with the PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook

Pages Used to Manage the Hold/Release Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Hold/Release	RUNCTL_CLHR	Financial Aid, Loans, CommonLine Management, Process Hold Release, Hold/Release	Run the set hold/release process. Establish run control settings and execute the FAPLCLHR COBOL process.
Hold/Release Error Messages	LN_HR_MSG_LOG	Financial Aid, Loans, CommonLine Management, Review Hold/Release Errors, Hold/Release Error Messages	View error messages for each loan disbursement for a selected student. Only messages generated from the most recent execution of the Hold/Release process (FAPLCLHR) can be viewed.

Running the Set Hold/Release Process

Access the Hold/Release page (Financial Aid, Loans, CommonLine Management, Process Hold Release, Hold/Release).

Hold/Release

Run Control ID: PS [Report Manager](#) [Process Monitor](#) **Run**

Control Information Find First 1 of 1 Last

*Institution: PSUNV *Aid Year: 2004 *Career: UGRD *Process Name: HOLD_REL *Hold/Release Option: Both Hold/Release

Selection Criteria

*From Date: 09/09/2004 *Thru Date: 09/09/2004 ☒ Student Override

Student Override Find View All First 1 of 1 Last

*ID:

Hold/Release page

Process Name	Select the Process Name equation set that you defined on the Hold/Release Equations setup page.
Hold/Release Option	<p>Select a hold or release option.</p> <p><i>Both Hold/Release:</i> Evaluate disbursements currently set to Release and reset to Hold, if ineligible, and evaluate disbursements currently set to Hold and reset to Release, if eligible.</p> <p><i>Release:</i> Select to evaluate disbursements currently set to Release and reset to Hold, if ineligible.</p>
From Date and Thru Date	Enter the earliest and latest dates for disbursement that you want to process.
Student Override	Select to activate the ID field. You can then select individual IDs for processing.
ID	When you run the process, the system evaluates only the loan disbursements for the entered IDs that fall within the From Date and Thru Date fields.

Resolving Change Transaction Errors

When a change transaction record is rejected, the rejected record is sent to the school in the application response file as a Change Transaction Error @6 record. Up to five error messages can be provided on this record.

This section discusses how to:

- Identify change error records.
- Review error messages.
- Resolve error messages. and run loan adjustments.

Pages Used to Change Transaction Errors

Page Name	Definition Name	Navigation	Usage
CL Loans on Hold (FA901) Report	FA901	Financial Aid, Loans, CommonLine Reconciliation, Loans on Hold Report	Identify adjusted loans on hold.
Loan Origination Auth Sumry (FA850) Report	FA850		Identify loan cancellation charges that were rejected.
Loan Application Summary	LOAN_ORIG_SUMM_DTL	Financial Aid, Loans, View Loan Application Status	View loan summary information. Links are made available to more detailed loan information.
Loan Origination Information	LOAN_ORIG_SEC	Click the Origination Status link on the Loan Application Summary page.	Determine whether the system has created a change transaction for the loan. View the CRC status codes and the corresponding CRC staging table information for the selected loan action row.
Origination Loan Disbursement	LOAN_DISBURSEMENT	Click the Disbursement Status link on the Loan Application Summary page.	Determine whether the system has created a disbursement level change transaction for the loan.
Loan Origination Change	LN_CL_ORIG_CHG_SEC	Click something on the Loan Origination Information page.	Locate rejected loans identified on the Loan Origination Information page.
Loan Disbursement Change	LN_CL_DISB_CHG_SEC	Click something on the Loan Origination Information page.	Locate rejected loans identified on the Loan Origination Information page.
CommonLine Loan Origination Transmission	LOAN_ORIG_TRANS	Click something on the Loan Origination Information page.	Remove the hold status on rejected loans that have been corrected.

Identifying Change Error Records

To identify change error records:

1. Run the CL Loans on Hold (FA901) report to identify adjusted loans on hold.
2. Run the Loan Origination Auth Sumry (FA850) report to identify loan cancellation changes that were rejected.

Use *OX* for the loan action code and a loan action status of *R*.

Reviewing Error Messages

Use the Loan Origination Information page to identify loans with a loan action status of Rejected. Determine the change record types that were generated and navigate to the appropriate Loan Origination Change or Loan Disbursement Change pages to find the rejected record.

The rejected record has a change status of *Error*. The Message link should also be active. Click the Message link to view the error messages.

See Also

[Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Information, page 1300](#)

[Chapter 36, "Processing CommonLine Loans," Viewing Loan Origination Change, page 1301](#)

Resolving Error Messages and Running Loan Adjustments

Make the necessary changes to correct the rejection. Required actions vary based on the error messages displayed. After you have taken corrective action, use the CommonLine Loan Orig Trans page to remove the hold.

After the hold has been removed—resetting the Loan Processing Stat field to *In Service*—run the loan origination process again. The process generates a new change transaction record for the loan. New change transactions for the rejected change transaction record, plus any additional changes made to the loan, are created. Then follow the normal procedures to complete the processing of the change: validate the loan, create outbound files, and send them.

See Also

[Chapter 36, "Processing CommonLine Loans," Managing Loan Origination Transmission Data, page 1297](#)

Processing School Certification Request Applications

This section provides an overview of school certification requests and discusses how to:

- Process school certification requests for CRC.
- Process school certification requests for CL 4.

Understanding School Certification Requests

The certification request process is an optional CommonLine process for some alternative loans. The process differs from FFELP loan application processing in that the borrower applies for the loan directly with the lender instead of through the school's financial aid office. The lender or servicer then asks the school to certify the borrower's eligibility by initiating a CommonLine application response record to the school. The school might not have a record of the student in the financial aid system, either because the student did not apply for aid or the student does not exist in the school's database.

How school certification requests are handled depends on which CommonLine loan version initiates the process. The older CommonLine 4 process is handled manually, while the newer CRC process automates many of the steps.

Pages Used to Process Certification Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Inbound CRC XML Files	SFA_RUNCTL_CRC_IN2	Financial Aid, File Management, CommonLine Loans, Process CRC Inbound files, Inbound CRC Files	Load school certification request XML files. Move files into the database
CRC Document Management	SFA_CRC_FILE_REV	Financial Aid, File Management, CommonLine Loans, CRC Document Management, CRC Document Management	Review generated XML files, outbound to stage files, XML loaded to stage files, or XML processed files.
CRC Award Management	SFA_CRC_LOAD	Financial Aid, File Management, CommonLine Loans, CRC Award Management	View process status and loan information.
View CRC Staging Table Records		Financial Aid, Loans,	View information on school certification request XML files that have been loaded.
Process Inbound CRC Files		Financial Aid, Loans,	Process and load individual CRC certification request records into the CRC Certification Requests page.
CRC Certification Requests	SFA_CRC_CERT_RQ	Financial Aid, Loans, CommonLine Management, CRC Certification Requests	Review and update loan certification request records to originate.

Page Name	Definition Name	Navigation	Usage
Student Block Information	SFA_CRC_CERT_STDNT	Click the Student link on the CRC Certification Requests page.	View student's social security number, name, and birthdate to assist in identifying the EmplID.
Person Block Information	SFA_CRC_CERT_PERSN	Click the Person link on the CRC Certification Requests page.	View non-student borrower's social security number, name, and birthdate to assist in identifying the borrower ID.
Search Criteria	HCR_SM_SEARCH	Click the Search Match link on the CRC Certification Requests page.	Enter search criteria to determine whether the student is defined in the database.
Relationships	RELATIONSHIPS	Click the Related IDs link on the CRC Certification Requests page.	View relationship data.
Award Summary	STDNT_AWRD_INQUIRY	Click the Award Summary link on the CRC Certification Requests page.	Review annual award summary. View a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award.
(Inbound EC Agent) Run Control	EC_RUN_INBOUND_01	Financial Aid, File Management, CommonLine Loans, Inbound EC Agent	Load the school certification request records.
CommonLine Inbound	RUNCTL_CLIN	Financial Aid, File Management, CommonLine Loans, Process CL4 Inbound Files	Identify the certification request records.
Financial Aid Report (CL 4 App Response Load Errors Report)	RUN_CNTL_CL_RPT	Financial Aid, File Management, CL4 Load Error Report	List records with a load status of Error.
Financial Aid Report (CL 4 School Cert Requests Report)	RUN_CNTL_CL_RPT	Financial Aid, Loans, CommonLine Reconciliation, CL4 Certification Request Rpt	List the application information provided by the loan servicer.
CommonLine PNote - Stafford	SFA_CRC_PNOTE_STAF	Financial Aid, Loans, CommonLine Management, Enter Stafford Prom Notes	Enter the certification request report information.
Promissory Note Plus	SFA_CRC_PNOTE_PLUS	Financial Aid, Loans, CommonLine Management, Enter PLUS Prom Notes	Enter promissory note data for PLUS loans. The system uses this data for origination.

Page Name	Definition Name	Navigation	Usage
Promissory Note Alt	SFA_CRC_PNOTE_ALT	Financial Aid, Loans, CommonLine Management, Enter ALT Loan Prom Notes	Enter the certification request report information.
CommonLine 4 Import	CL_IMP_MAIN4	Financial Aid, File Management, CommonLine Loans, View CL 4 Response Records, Application Detail	Set the load status of each processed certification request record to Processed. Use Skipped if the student is not eligible.

Processing Certification Requests for CRC

To process school certification request applications for CRC loans:

1. To load the school certification request XML files, run the Inbound CRC XML Files process. Use the CRC Document Management, CRC Award Management, and View CRC Staging Table Records pages to monitor this information .
2. To process the individual records, run the Process Inbound CRC Files process, which loads the certification request records into the CRC Certification Requests page. If the lender or guarantor listed on the record is not a valid certification request participant with the school, the record does not load and receives an error status.

During the load, the system uses the Search Match process to assign the student (and borrower) EmplID to the record, although the record loads if the system cannot identify the EmplID. For PLUS loans, you can create the parent EmplID and load parent information into the Campus Community core tables.

3. To view the records that were successfully loaded, use the CRC Certification Requests page, which has various criteria fields on the search page to view only the records of interest. After you verify that the Aid Year, Loan Type, EmplID, and Borrower ID (for PLUS) fields are completed, select the Ready to Use check box. This allows the loan origination process to originate the loan using the certification request information.

Use the CRC Document Management, CRC Award Management, and View CRC Staging Table Records pages to review the records loaded in *Error*.

4. Award the student the necessary loan eligibility. The student must be awarded in the same aid year with the appropriate item type(s) based on the aid year and loan type that has been assigned to the certification request record.

See [Chapter 28, "Awarding and Packaging Students," Awarding Online, page 990](#).

5. Originate the loan. The information entered on the CRC Certification Requests page is used during loan origination. After origination completes, access the Maintain Originated Loans pages (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans) to ensure the correct loan destination and process level are being used. The correct process level depends on what the loan servicer expects from the school.

See [Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1271](#).

6. Run loan validation to check the loan origination application for discrepancies

See [Chapter 36, "Processing CommonLine Loans," Validating CommonLine Loans, page 1291.](#)

7. 11. Run the CommonLine Outbound processes to create the CRC application send file(s). Send the file(s) to your loan servicers for processing.

See [Chapter 36, "Processing CommonLine Loans," page 1257.](#)

Access the CRC Certification Requests page (Financial Aid, Loans, CommonLine Management, CRC Certification Requests).

CRC Certification Requests			
Award ID:	00131500000PLUS91		Academic Institution: PSUNV
Award:	FFELPLUS		<input type="checkbox"/> Ready To Use
Aid Year:	<input type="text" value="2005"/>		
Loan Type:	<input type="text" value="PL"/>	FFEL Parent Loan - Sems	
EmplID:	<input type="text" value="FA0743"/>	Bearn,Suzanne F	Student
Borrower ID:	<input type="text" value="0095"/>	Felde,Juan	Person
Request Amt:	15000.00	Loan Period: 2004-08-30	To: 2005-05-09
Lender OPEID:	807807	Branch ID:	
Guarantor OPEID:	706	Branch ID:	
Alternative Loan Code:			Received Date: 08/02/2005
		Process Date:	
Search Match Related IDs Award Summary			

CRC Certification Requests page

Lender OPEID (lender office of postsecondary education identifier) Indicates the numeric identifier assigned by the Department of Education.

Guarantor OPEID (guarantor office of postsecondary education identifier) Indicates the numeric identifier assigned by the Department of Education.

Student Click to access the Student Block Information page to view the student's social security number, name, and birthdate. Use to assist in identifying the EmplID.

Person Click to access the Person Block Information page to view the non-student borrower's social security number, name, and birthdate. Use to assist in identifying the borrower ID.

Search Match	Click to access the Search Criteria page to enter search criteria to determine whether the student or borrower is defined in the database.
Related IDs	Click to access the Relationships page to review relationship data of the student and parent. Create the relationship if required for PLUS loan processing.
Award Summary	Click to access the Award Summary page to review annual award summary and to view a student's awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award. Use to verify the student's eligibility for the loan.

See Also

Chapter 34, "Reviewing Awards," Reviewing an Annual Award Summary, page 1212

Processing School Certification Requests for CL4

To process school certification request applications for CommonLine 4 loans:

1. Load the school certification request records using the Inbound EC Agent process.
2. To process the individual records, run the CommonLine Inbound process.

When this process is run, any certification request records are automatically set to *Error*.

3. Run the CL 4 App Response Load Errors report to list records with a load status of *Error*.
4. Run the CL 4 School Cert Requests report for information necessary to process the loan.

The CL 4 School Cert Requests report selects only certification request records that have a load status of *Error*. The report lists the application information provided by the loan servicer.

5. Review the information from each report and process each certification request.
 - a. Determine whether your school participates in the loan program identified on the report.
 - b. If your school participates, verify that the appropriate financial aid item types, loan types, and loan destinations have been set up to process the loan.
6. Enter the certification request report information in the appropriate CommonLine Prom Note page for Stafford, PLUS, or Alt..
7. Award the student the necessary loan eligibility.

See Chapter 28, "Awarding and Packaging Students," Awarding Online, page 990.

8. Originate the loan. The information entered on the Prom Note pages is used during loan origination. After origination completes, access the Maintain Originated Loans pages (Financial Aid, Loans, CommonLine Management, Maintain Originated Loans) to ensure the correct loan destination and process level are being used. The correct process level depends on what the loan servicer expects from the school.

See Chapter 36, "Processing CommonLine Loans," Originating CommonLine Loans, page 1271.

9. If the loan servicer has generated the unique loan ID, update the loan origination record by overriding the unique ID generated by the origination process with the loan servicer's ID.

See [Chapter 36, "Processing CommonLine Loans," Reviewing Loan Origination Information, page 1278.](#)

10. Run Loan Validation to check the loan origination application for discrepancies

See [Chapter 36, "Processing CommonLine Loans," Validating CommonLine Loans, page 1291.](#)

11. Run the CommonLine Outbound processes to create the CommonLine 4 application send file(s). Send the file(s) to your loan servicers for processing.

See [Chapter 36, "Processing CommonLine Loans," page 1257.](#)

12. In the CommonLine 4 Import page, set the load status of each processed certification request record to *Processed*. Use *Skipped* if the student is not eligible. A status of *Processed* or *Skipped* ensures that the student is not listed on future reports because the delivered reports key from a status of *Error*.

Adjusting Loan Disbursements Manually

This section discusses how to modify disbursements.

Pages Used to Adjust Loan Disbursements Manually

Page Name	Definition Name	Navigation	Usage
CommonLine Disbursement Maintenance	LOAN_FUND_MAINT	Financial Aid, Loans, CommonLine Management, Maintain CL Disbursements, CommonLine Disbursement Maintenance	Adjust disbursements for all CommonLine loans and document the disbursement and return of funds. Suspend or release disbursements.
Comments	LN_DISBACT_COM_SEC	Click the Comments link on the CommonLine Disbursement Maintenance page.	Open a free-form comment page that is associated exclusively with the loan action code entered in the page.

Modifying Disbursements

Access the CommonLine Disbursement Maintenance page(Financial Aid, Loans, CommonLine Management, Maintain CL Disbursements, CommonLine Disbursement Maintenance).

CommonLine Disbursement Maintenance

ID: FA0721 Amanda Smith
Institution: PSUNV PeopleSoft University **Aid Year:** 2005
Loan Type: STAF FFEL Stafford - Sems **Career:** UGRD
Item Type: 900000000304 Fed Std Loan-Subsidized **Appl Seq:** 1 **Fund Maint.**

Loan Disbursement Info			Loan Award Information (Interfaced to Authorization)			
Disb ID	Ln Dsb Amt	Net Disb	Net Disb	Dsb Actl	ActDisb Dt	Suspend Disb
01	1750.00	1678.77	1678.77	1678.77	10/02/2004	N

Disbursement Actions [Customize](#) | [Find](#) | First 1-5 of 5 Last

[Actions](#) | [Check Information](#) | [Lender Information](#) |

Sequence	*Action Code	Description	Actn Net	Action Dttm
1	N	Anticipated Disbursement	1680.00	10/02/2004 12:03:03PM
2	PSA	Approved for disbursement	1678.77	10/02/2004 12:09:22PM
3	PSFA	Award Fees Adjusted from Loan	1678.77	10/02/2004 12:09:22PM
4	PSCD	Check Received from Lender	1678.77	10/02/2004 1:52:51PM
5	PSDS	Disbursed to Student Account	1678.77	10/02/2004 3:30:09PM

CommonLine Disbursement Maintenance page: Actions tab

Loan Award Information (Interfaced to Authorization)

Net Disb (net disbursement) The total EFT or manual check balance for the disbursement ID. This is the maximum amount authorized. This can only be updated by the EFT load and this page.

Dsb Actl (disbursement actual) Total amount disbursed to the student's account.

ActDisb Dt (account disbursement date) The last date the student's account was updated for this loan disbursement.

Suspend Disb (suspend disbursement) A value of *Y* indicates that the system is suspending disbursement processing for this loan disbursement. Authorization continues to function.

N indicates the disbursement is not suspended. This is set in the loan adjustment program when loans are reduced and an EFT has been received.

To set this value, enter the appropriate code in the Action Code field to make the field available.

Actions Tab

Sequence The origination action sequence is generated from the loan record activity.

Action Cd (action code)	<p>Enter an action code for the task you want to perform (entering a check, for example). When you enter the code, appropriate fields become available.</p> <p><i>PSAD</i>: Manual Fund Adjustment. Used to change disbursement amounts. The net disbursement is adjusted with the value of action net.</p> <p><i>PSCD</i>: Check Received from Lender. Used for manual check entry. Updates Student Financials. Assumes the check has been endorsed by the borrower. The net disbursement is adjusted with the value of action net.</p> <p><i>PSCR</i>: Funds Returned to Lender. Used when funds have been returned to the disbursing agent or lender. The net disbursement is adjusted with the value of action net.</p> <p><i>PSCN</i>: Unendorsed Check Received. Used for manual check entry. Updates Student Financials. The check does not disburse to the student's account. The net disbursement is adjusted with the value of action net. The Suspend Disb (suspend disbursement) field is set to Y.</p> <p><i>PSCE</i>: Check Endorsed. Used to indicate a previously received check has been endorsed by the borrower. The Suspend Disb (suspend disbursement) field is set to N. A previously unendorsed check can now be disbursed to the student's account.</p> <p><i>PSFH</i>: Suspend Disbursement Processing. The Suspend Disb (suspend disbursement) field is set to Y. This prevents disbursement to the student's account.</p> <p><i>PSRH</i>: Release Suspended Disbursement. The Suspend Disb (suspend disbursement) field is set to N. This permits disbursement to the student's account.</p> <p><i>PSPR</i>: Pending Resolution. Informational only. Can be used in conjunction with reports to manage the timely disbursement and return of loan funds.</p> <p><i>PSFN</i>: Funds Need to be Returned. Informational only. Can be used in conjunction with reports to manage the timely disbursement and return of loan funds.</p>
Actn Net (action net)	<p>Indicates adjustments made to the disbursement. When the loan action code is initiated by the loan origination process or by the loading of an application response file, the value corresponds to the net disbursement. When loan action codes are manually inserted to reflect the receipt or adjustment of actual loan funds—loading of EFT records or manual check entry—the Actn Net value is used to adjust the net disbursement on the page.</p>


Check Information Tab


Select the Check Information tab on the CommonLine Disbursement Maintenance page.

CommonLine Disbursement Maintenance

ID: FA0721 Amanda Smith
Institution: PSUNV PeopleSoft University **Aid Year:** 2005
Loan Type: STAF FFEL Stafford - Sems **Career:** UGRD
Item Type: 900000000304 Fed Stfd Loan-Subsidized **Appl Seq:** 1 **Fund Maint.**

Loan Disbursement Info			Loan Award Information (Interfaced to Authorization)			
Disb ID	Ln Dsb Amt	Net Disb	Net Disb	Dsb Actl	ActDisb Dt	Suspend Disb
01	1750.00	1678.77	1678.77	1678.77	10/02/2004	N

Disbursement Actions Customize | Find |  First 1-5 of 5 Last

[Actions](#) **[Check Information](#)** [Lender Information](#) 

Sequence	Check Number	Check Date	Check Received	
1				
2				
3				
4	39484872	09/01/2005	10/02/2004	Comments
5				

CommonLine Disbursement Maintenance page: Check Information tab

Sequence The origination action sequence is generated from the loan record activity.

Comments Click to open a free-form comment page that is associated exclusively with the loan action code entered in the page.

Fund Maint (fund maintenance) Click to enter transactions. When entering check transactions, the Check Number, Check Date, and Check Received fields can be updated with the check information.

Lender Information Tab

Select the Lender Information tab.

CommonLine Disbursement Maintenance					
ID:	FA0721	Amanda Smith		Aid Year:	2005
Institution:	PSUNV	PeopleSoft University		Career:	UGRD
Loan Type:	STAF	FFEL Stafford - Sems		Appl Seq:	1
Item Type:	900000000304	Fed Stfd Loan-Subsidized		Fund Maint.	
Loan Disbursement Info			Loan Award Information (Interfaced to Authorization)		
Disb ID	Ln Dsb Amt	Net Disb	Net Disb	Dsb Actl	ActDisb Dt
02	1750.00	1678.77	1678.77	0.00	
			Suspend Disb		
			N		
Disbursement Actions Customize Find First 1-4 of 4 Last					
Actions Check Information Lender Information					
Sequence	OPEID	Description	Branch ID		
1					
2					
3					
4	802176	Fleet Bank (in TN)			

CommonLine Disbursement Maintenance page: Lender Information tab

The Lender Information tab reflects whether the loan is a CL4 or a CRC processed loan. CL4 Lender Information displays the lender ID in the Loan Check Lender column. CRC Lender Information displays the lender's OPEID and branch ID values.

Loan Check Lender For CL4 loans, the Lender ID value of the lender is displayed. The OPEID and Branch ID columns do not display.

OPEID Displays the ID of the lender who issued the check as entered in the page. When entering check information, the field allows you to select the lender by OPEID.

Description Displays the name of the lender who issued the check.

Branch ID Indicates the branch number of the lender OPEID. This field is populated when inserting check information.

Entering Checks Manually

Enter all checks received on this page.

Use the following action codes:

- *PSCD* (Check Received from Lender) if the check is to be disbursed as soon as possible.
- *PSCN* (Unendorsed Check Received) if unendorsed checks need to be entered, but the funds should not be disbursed to the student's account until the endorsement has been received. After the endorsement is received, a new row must be inserted with the value of *PSCE* (Check Endorsed) to allow the funds to be disbursed.

Adjusting Amounts After Receipt of Funds

Enter the check for the entire amount for the first loan. Use action code *PSCD*. Next, enter a new action of *PSAD* (Manual Fund Adjustment) enter a negative net amount in the value of the first disbursement for the second loan. Enter a comment explaining that reduction.

Next, select the first disbursement of the second loan. Enter action *PSCD* and enter a net amount for the value of the check reduction. Enter a comment explaining the entry.

Tracking Disbursements Example

Here is an example of using the CommonLine Disbursement Maintenance page to track disbursements.

Loan funds are received using EFT roster. The EFT roster load date is assumed to be the date funds are received by the institution. Authorization and disbursements are run for all students on the roster.

Run the CommonLine reconciliation reports to select all EFT records not disbursed. Review each record not disbursed. Based on the status of each disbursement, you can determine whether:

- The disbursement needs to be returned or reissued. Update the loan and award if necessary. Run the loan adjustments process to calculate a return amount or reissue date. Insert an action code of *PSFN* (Funds Need to be Returned). Use the Actn Net field or the comment page to document the amount to be returned. After the funds have been returned, enter a new action code of *PSCR* (Funds Returned to Lender), and enter the amount. This reduces the net disbursement amount to zero. If the disbursement is to be reissued later, the new check is processed normally.
- The disbursement can be made after an issue is resolved. As an example, the student needs to enroll full time. Insert an action code of *PSPR* (Pending Resolution). Enter a comment documenting why the disbursement should be held. Continue to run the EFT Reconciliation reports to monitor the status of the disbursement. If, after ten days, you determine that the check must be returned, enter a new action of *PSFN*. After the funds have been returned, enter a new action code of *PSCR* and enter the amount.

Chapter 37

Processing Direct Loans

This chapter provides the required information for direct lending mandated by the Department of Education. This chapter provides an overview of direct lending and discusses how to:

- View packaging results before origination.
- Re-award direct loans with new disbursement plans.
- Originate direct loans and view loan status summary information.
- Process and review direct lending origination information.
- View and override bio/demo data for direct lending.
- Override and view direct loan origination data and action messages.
- Create and use promissory notes.
- View promissory note action history and loan disbursement messages.
- Process direct loan manifests.
- Use EC queue status with Direct Loan processing.
- View Direct Loan EC history.
- Process direct lending origination changes.
- Understand direct lending change processing.
- Manage direct lending cash transactions.
- Enter cash summary data.
- Use loan/import programs.
- View data import information.
- Work with the DL school account statement and the DL reconciliation reports.
- Run direct lending reports.
- Use demographic data selection for loan origination.

See Also

Chapter 46, "Using Common Origination and Disbursement," page 1747

Understanding Direct Lending

The William D. Ford Federal Direct Loan program was established to provide long-term academic loans to qualified students who are enrolled in facilities of higher education, vocational, technical, business and trade schools. The Federal Government provides the funds for direct loans directly to the student, bypassing an outside lender. Students who receive federal direct loan funds cannot receive FFEL (federal family education loan) funds during the same enrollment period. Schools participating in the Direct Loan program communicate direct loan origination and disbursement data using the Common Origination and Disbursement (COD) process.

The Oracle Financial Aid system supports COD processing for the Direct Loan, Pell and ACG/SMART award programs. Once these award programs are awarded within the system, you run a process that creates distinct COD application records to support the maintenance and processing of COD data.

For each Common Record received and processed by the COD System, the COD System returns a Response document indicating the status of processing, including any rejected data elements and reasons. For Direct Loans, you must create the origination, change, and disbursement record so that the system can properly load and process corresponding inbound acknowledgement records (origination, change and disbursement). There must always be a one to one match between any Direct Loan outbound document and corresponding inbound response document.

Note. Web-initiated activated, identified with a Document Type value of 'WB' is not supported by the Oracle Financial Aid system. Web-initiated documents only load to the COD staging records to provide a means to view data; data is not processed.

The three types of direct loans are:

<i>Direct Loan Type</i>	<i>Loan Characteristics</i>
Direct Subsidized Stafford Loan	A student's eligibility for a Direct Subsidized Stafford loan is determined entirely on the student's ability to demonstrate financial need. The U.S. Department of Education subsidizes the interest; therefore, borrowers are not charged interest while they are enrolled in school at least half time, and during grace and deferment periods.
Direct Unsubsidized Stafford Loan	A student is eligible for a Direct Unsubsidized Stafford loan regardless of their financial situation. Borrowers are responsible for paying the interest on these loans.
Direct PLUS Loan and Graduate PLUS Loan	Direct PLUS and Graduate PLUS loans allow parents to borrow on behalf of their dependent students who are enrolled at least half time. Borrowers are responsible for paying the interest on these loans.

The direct lending portion of the Financial Aid package is designed to help you process the Subsidized Stafford, Unsubsidized Stafford, PLUS, and Grad/PLUS loans awarded to students attending your institution.

Viewing Packaging Results Before Origination

You should include a preliminary and periodic review of your packaging results, your loan amount, loan fees, and rebate information for each loan record. This minimizes the potential for incorrect information being originated and submitted to the common origination and disbursement processing center.

Note. Refer to financial aid packaging chapters for special setup of financial aid item types, disbursement plans and split codes for Direct Loan types.

Re-awarding Direct Loans with New Disbursement Plans

The Packaging process does not allow you to change the disbursement plan for direct lending loans, even if the loan has not been originated. If you award a direct lending loan for two terms and then find that the student should only be awarded for one term, you must change disbursement plans. There are two ways to change disbursement plans for non-originated direct lending loans:

Option 1

1. Cancel the original loan (with the original disbursement plan and split code) on the Student Aid Package page.
2. Insert a row on the Student Aid Package page below the row for the canceled loan in Step 1.
3. Using the same financial aid item type as the original loan, award the loan with the new disbursement plan and split code.

Note. If you use professional judgement to override an award amount, ensure that your loan disbursements (amounts, fees, and rebates) are split correctly among your item types. Refer to the common origination and disbursement technical data for details.

Option 2

1. Using the original loan that you awarded (with the original disbursement plan), create a custom split so the money is allocated only to the new terms.
2. Originate the loan.
3. Access the Application Financial page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application) and select the Override Loan Dates check box. Change the Loan Period Start, Loan Period End, and Antc Date (anticipated disbursement date) to match the new period for which the loan is awarded.

Originating Direct Loans and Viewing Loan Status Summary Information

This section discusses how to:

- Originate direct loans.
- View loan status summary information.

Pages Used to Originate Direct Loans and Display Loan Status Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Loan Origination	RUNCTL_LNORIG	Financial Aid, Loans, Process Loans, Loan Origination	Originate any Stafford or PLUS loans that have been awarded and have an award status of <i>Accepted</i> . The Stafford or PLUS loans must have the loan program indicated as <i>Direct</i> .
Loan Status Summary Information	LN_DLSTATSUM_SEC	Click the Loan Status Summary link on any Direct Lending processing page that has the link available.	View current loan summary information and quickly check the status of the loan.

Originating Direct Loans

This section discusses how to originate any Stafford or PLUS loans that have been awarded and have an award status of *Accepted*.

Access the Loan Origination page (Financial Aid, Loans, Process Loans, Loan Origination).

Loan Origination

Run Control ID: PS [Report Manager](#) [Process Monitor](#) **Run**

Control Information Find First 1 of 2 Last

*Institution: PSUNV *Aid Year: 2009 *Career: GRAD CL Orig Options: Use Prom. Note ☒ Adjustments

☒ Use Loan Program Direct Lending

Selection Criteria

Last Name FROM: Last Name TO:

Student Override Find | View All First 1 of 1 Last

ID: FAD0147 Name: Hutt, Peter R ☒ Student Override

Loan Origination page

Control Information

Use this page to run the Loan Origination process (FAPLBOG1). You can add additional rows to include different institution, aid year, and career combinations for originating loans.

CL Orig Options
(CommonLine origination options)

This field is used for CommonLine loans only.

Adjustments

Select to include origination adjustments when you run the origination process. When this check box is selected, origination adjustments are processed for loans in which the overall amount and/or disbursement amount has changed. Students who have origination adjustments are not included in the values for the ID field in the Student Override group box unless this check box is selected.

Selection Criteria

Use the fields in the Selection Criteria group box to originate loans for a group of students selected by last name. Only students with the selected Institution, Aid Year, and Career are selected. You can enter names in the Selection Criteria only if the Student Override check box is *not* selected.

Last Name FROM

Enter the beginning last name of the group of students to originate. Enter the names in alphabetical order. For example, Last Name FROM *Atkins* and Last Name TO *McMurphy*.

Last Name TO Enter the ending last name of the group of students to originate. Enter the names in alphabetical order.

Student Override

The Student Override group box is used to originate loans for a single student or a group of specific students within the selected Institution, Aid Year, and Career.

Student Override Select this check box to originate specific students. When you select this check box, the ID field becomes available.

ID Enter the unique ID of the student to originate. Only students with loans that have a loan award in the *Accepted* status are available. You can insert rows to originate multiple students.

View Loan Status Summary Information

Access the Loan Status Summary Information page (click the Loan Status Summary link on any page with an available link).

Loan Status Summary Information					
Student Eligibility					
DL Pnote Unique ID:			Loan Orig Ack Pnote Stat:		
Origination Detail Find View All First 1 of 1 Last					
Item Type:	Direct Sub Stafford		DL Booked Status:	Unbooked	
Loan Action Code:	Loan Originated		Action Status:	Pending	10/31/2008
Loan Application ID:	539900728S09G01315001		Request Amount:	\$1,200.00	
			Certified Amount:	\$1,200.00	
Disbursement Information Customize Find View All First 1-2 of 2 Last					
Actions		Amounts			
Disb ID	LOC Antic ID	LOC Actual ID	Description	Action Status	
01	01		Anticipated Disbursement	Pending	10/31/2008
11	02		Anticipated Disbursement	Pending	10/31/2008

Loan Status Summary Information page

Student Eligibility

DL Pnote Unique ID Displays the promissory note identifier assigned to this loan.
(direct lending promissory note unique ID)

Loan Orig Ack Pnote stat (loan origination acknowledgement promissory note status) Displays the current status of the promissory note. Values are *Ack Pending* (acknowledgement pending), *Accepted*, and *Rejected*.

Origination Detail

Item Type Displays the financial aid item type associated with this loan.

Loan Action Code Displays the most recent loan origination action for the loan. For example, *Loan Origination*, *Loan Origination Change*, and so on.

Loan Application ID Displays the unique ID that the Origination process generated for this loan. The loan application ID is comprised of the following elements:

- Student's social security number.
- A single-character code identifying the type of loan (Subsidized, Unsubsidized, PLUS).
- A two-character code identifying the aid year.
- Direct Loan school code.
- A 3-digit sequence number, which is incremented by one each time the student receives an additional loan of the same type.

DL Booked Status (direct lending booked status) Displays *Booked* if the origination, first disbursement, and promissory notes are accepted and acknowledged by the COD. Until this occurs, the status is *Unbooked*.

Action Status Displays the current status of the action. The values are: *Accepted*, *Ac-NtApld* (accepted-not applied), *Authorized*, *Failed*, *Invalid*, *Pending*, *Received*, *Rejected*, and *Transmitted*. The Action Status for an Acknowledgement is always *Received*. If an origination or origination change is rejected, the system creates a new loan originated row to track the resubmission of the failed/rejected action.

Request Amount Displays the amount derived from the accepted amount on the award and is equal to the scheduled disbursement amount.

Certified Amount Displays the amount approved for the loan. This value is derived from the offer amount on the award.

Actions Tab

Disb ID (disbursement ID) Displays the ID number assigned to the disbursement record. Values are *01* through *20*.

LOC Antic ID (loan origination center replaced by common origination and disbursement anticipated [disbursement] ID)

Displays the sequentially ordered ID for the anticipated disbursement. The system converts the disbursement ID that comes from the awarding page to assist in disbursement sequencing requirements.

LOC Actual ID

Displays the numerically ordered disbursement ID, without skipping numbers. The system converts the disbursement ID to meet COD requirements. The COD ignores disbursement IDs from Financial Aid awarding; disbursements need to be sequentially ordered. This number does not change throughout the processing and is sent to the COD with the origination file. For example, a student receives disbursements for Disbursement ID 1 and Disbursement ID 2 associated with fall term. Disbursements IDs 3 and 4 are associated with spring term.

Action Code

Describes the type of disbursement action for that row.

Action Status

Displays the status for this disbursement ID. See the description of the Action Status field above for more details.

(unlabeled)

Indicates the date of the disbursement action.

Amounts Tab

Select the Amounts tab.

Loan Status Summary Information					
Student Eligibility					
DL Pnote Unique ID:			Loan Orig Ack Pnote Stat:		
Origination Detail Find View All First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last					
Item Type:	Direct Sub Stafford		DL Booked Status:	Unbooked	
Loan Action Code:	Loan Originated		Action Status:	Pending 10/31/2008	
Loan Application ID:	539900728S09G01315001		Request Amount:	\$1,200.00	
			Certified Amount:	\$1,200.00	
Disbursement Information Customize Find View All <input type="button" value="⚙️"/> First <input type="button" value="◀"/> 1-2 of 2 <input type="button" value="▶"/> Last					
Actions		Amounts			
LOC Antic ID	LOC Actual ID	Ln Dsb Amt	Net Disb	Ln Fee Amt	Rebate Amt
01		\$600.00	\$591.00	\$18.00	\$9.00
02		\$600.00	\$591.00	\$18.00	\$9.00

Loan Status Summary Information page: Amounts tab

Ln Dsb Amt (loan disbursement amount)

Displays the gross scheduled disbursement amount. This value is derived from the accepted balance on the loan award.

Net Disb (net disbursement)	Displays the amount derived from the loan amount minus the loan fee amount plus the rebate amount.
Ln Fee Amt (loan fee amount)	Displays the calculated loan fee for this disbursement.
Rebate Amt (rebate amount)	Displays the calculated rebate amount for this disbursement.

Processing and Reviewing Direct Lending Origination Information

Access to the Direct Loan Application component should be restricted to key personnel who are actively involved with the Direct Lending process. The information in this component is eventually transmitted to the common origination and disbursement processing center (COD) in the origination outbound file.

This section discusses how to:

- Process and review borrower bio/demo data.
- Process and review miscellaneous borrower data.
- Process and review financial data.
- Process and review loan application acknowledgement data.

Pages Used to View Loan Change Transmission Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Bio/Demo	LOAN_ORIG_DMO_DL01	Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Bio/Demo	Review and correct borrower information, student information, and parent information for PLUS loans. This information comes from Campus Community as well from ISIR load information that the system populates on the Institutional Application pages.
Application Misc Data (application miscellaneous data)	LOAN_ORIG_ELG_DL01	Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Misc Data	Process and review information about student eligibility, promissory note printing, and loan credit.

Page Name	Definition Name	Navigation	Usage
Application Financial	LOAN_ORIG_FIN_DL01	Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Financial	Review financial data and adjust the loan start, end, and certification dates. Use an override check box to change any of these dates.
Application Acknowledgement	LOAN_ORIG_STAT_DL0	Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Acknowledgement	Review loan process status, loan origination outbound, acknowledgement information, an data elements that go to the Origination files. Set and remove loans from Hold status. When the inbound files return from COD, the system acknowledges the data and populates the fields on this page.
Miscellaneous Loan Detail	LN_ORIG_TRNS_MISC	Click the Misc Loan Detail link on the Application Acknowledgement page.	View additional direct lending origination and acknowledgement information regarding the disclosure print option for the loan. The information displayed in this page represents an example of detail on an outbound file.
Loan Eligibility Detail	LN_ORIG_TRNS_ELIG	Click the Eligibility Detail link on the Application Acknowledgement page.	View origination and acknowledged direct lending eligibility detail information. The information displayed in this page represents an example of detail on an outbound file.
Borrower Detail	LN_ORIG_TRNS_BORR	Click the Borrower Detail link on the Application Acknowledgement page.	View origination and acknowledged detail information for the borrower. The information displayed in this page represents an example of detail on an outbound file.
Student Detail	LN_ORIG_TRNS_STU	Click the Student Detail link on the Application Acknowledgement page.	View origination and acknowledged detail information for the student. The information displayed in this page represents an example of detail on an outbound file.

Page Name	Definition Name	Navigation	Usage
Name Detail	LN_ORIG_TRNS_NAME	Click the Name Detail link on the Application Acknowledgement page.	View the origination and acknowledged name information for this loan. The information displayed in this page represents an example of detail on an outbound file.
Address Detail	LN_ORIG_TRNS_ADDR	Click the Address Detail link on the Application Acknowledgement page.	View origination and acknowledged address information for the borrower. The information displayed in this page represents an example of detail on an outbound file.

Processing and Reviewing Borrower Bio/Demo Data

Access the Application Bio/Demo page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Bio/Demo).

Application Bio/Demo		Application Misc Data		Application Financial	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DSUB	DIRECT SUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Borrower Information					
Borrower ID:	FAD0125	Jessica Lai	Related ID	Loan Refund Indicator:	Borrower
SSN:	539-90-0728	DOB:	03/21/1986	Borr Default / Owes Refund:	No
Citizenship:	Native	Visa/Alien Permit:			
Telephone:	614/459-3245	<input type="checkbox"/> Override Phone #			
Student Information					
SSN:	539-90-0728	Birthdate:	03/21/1986	Default / Refund:	No
Status:	Native	Visa/Alien Permit:			

Application Bio/Demo page

The Appl Seq (application sequence) number increases each time a new loan origination record is created for the ID, Career, Loan Type, Institution, and Aid Year combination.

Borrower Information

The fields in the Borrower Information group box contain information regarding the borrower of the loan. The borrower is also the student for Stafford loans. For PLUS loans, the borrower is a parent or guardian of the student and is defined within the Relationships pages in Campus Community.

Borrower ID	<p>Select from the values if no ID is present. Click the Related ID link next to this field to access demographic and address data for the borrower or student. For PLUS originations, you can also click the Related ID link to access the Relationships page.</p> <p>The PLUS borrower appears in this list only if the borrower is defined in Relationships as a Parent or Guardian. To define relationships, select Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Relationships. For a Grad PLUS loan, the borrower ID is set to match the student ID and cannot be modified.</p>
SSN (social security number)	Displays the social security number for the borrower.
DOB (date of birth)	Displays the date of birth for the borrower.
Loan Refund Indicator	Select a value if loan refunds go to the <i>Borrower</i> —the parent or guardian in the case of PLUS loan or to the <i>Student</i> .
Citizenship	<p>Indicates whether the borrower is a citizen of the United States.</p> <hr/> <p>Note. The direct lending program obtains citizenship information from the citizenship fields in PeopleSoft Enterprise Campus Community. The Packaging process uses the citizenship information on the Packaging Status Summary Database Match page, which is populated by the ISIR load.</p> <hr/>
Visa/Alien Permit	<p>Indicates whether a borrower who is not a U.S. citizen holds a valid Visa or Alien Permit.</p> <hr/> <p>Note. The Direct Lending program obtains this information from the citizenship fields in Campus Community.</p> <hr/>
Override Phone # (override phone number)	Select this check box to activate the Telephone field and override the current information. If you select this check box and override the phone number, the new value remains regardless of changes made to Campus Community records. If you clear the check box, the system populates the Telephone field with the current Campus Community values and makes the field inaccessible.
Borr Default / Owes Refund (borrower default/owes refund)	<p>Indicates whether a borrower is in default on a student loan or owes a refund to the federal government. Values are: <i>No</i>, <i>Overridden</i>, or <i>Yes</i>.</p> <p>For Stafford loans, this value is derived from the NSLDS Match field on the Packaging Status Summary page.</p> <hr/> <p>Note. <i>Overridden</i> applies to PLUS origination files only. <i>Overridden</i> is not an acceptable value for Direct Stafford loan origination files.</p> <hr/> <p>The values from the NSLDS Match field are translated to this field as shown in the following table.</p>

<i>Original Match Field Value</i>	<i>Default/Refund Value</i>
2. Default 3. Overpayment 4. Default and Overpayment	Yes
5. Eligible Partial Title IV Aid	Overridden
All other values	Not

Student Information

**SSN, Birthdate, Status,
and Visa/Alien Permit**

The values that appear are for the student associated with this loan. If the borrower is the student, this information is the same as the information in the Borrower Information group box.

Default / Refund

This is the same field as the Borr Default / Owes Refund field in the Borrower Information group box.

Processing and Reviewing Miscellaneous Borrower Data

Access the Application Misc Data page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Misc Data).

Application Bio/Demo		Application Misc Data		Application Financial		Application Acknowledgement	
ID:	FAD0125	Lai, Jessica E	Institution:		PSUNV		
Career:	UGRD	Undergraduate	Aid Year:		2009		
Loan Type:	DSUB	DIRECT SUBSIDIZED STAFFORD	Appl Seq:		1		
Loan Status Summary							
Student Eligibility							
Direct Lending Year:		Third Year		Depend Stat (Fed):		Dependent	
<input type="checkbox"/> HEAL Eligible		<input type="checkbox"/> PreProfessional Coursework Eligible		<input type="checkbox"/> Additional Unsub Eligibility			
PNote Print Information							
Loan Destination Nbr:		38 DIRECT LENDING 2004					
Loan Print Option:		School Prints		DL Disclosure Print:		LOC	
Loan Orig Ack Pnote Status:				DL Pnote Unique ID:			
				DL Pnote Expire Date:			
Loan Credit Information							
Loan Credit Eligibility:				Loan Credit Decision Dt:			
Loan Credit Override: <input type="checkbox"/>				Loan Endorser Amount:			

Application Misc Data page

Student Eligibility

Direct Lending Year	Contains the direct lending grade level for this student, as defined by the <i>Direct Lending Technical Reference</i> . The term in the Direct Lending Year field in FA Term on the FA Info page is related to the first distribution used in the award for this student. That term is used to derive this Direct Lending Year value.
Depend Stat (Fed) (dependency status, federal)	Displays the federal dependency status for the student. The status is derived from the FA Term table and is required on all established Direct Loans.
HEAL Eligible (Health Education Assistance Loan eligible)	Indicates whether the student is eligible for a HEAL loan, as determined on the Packaging Status Summary page and is valid only on Unsubsidized loans. HEAL loans are for health profession students who meet the HEAL program requirements. HPPA indicator tag reports a <i>true</i> value.
PreProfessional Coursework Eligible	Indicates whether the student is eligible for additional Unsubsidized Stafford due to participation in eligible undergraduate or graduate preparatory coursework. This value is derived from the Packaging Status Summary page. The student must have a Direct Lending Year of Fifth Year and above. Preprofessional Coursework indicator tag reports a <i>true</i> value.

Additional Unsub Eligible (additional unsubsidized eligible)	<p>Indicates whether the student is eligible for the additional Unsubsidized loan amount. This value is derived from the Plus Override check box on the Database Matches page accessed from the Packaging Status Summary page. A student is eligible for the additional Unsubsidized loan if the student is a dependent and the parent or guardian is denied a PLUS loan. This field is valid only on Unsubsidized loans.</p> <p>This check box is selected if the student is a dependent and the PreProfessional Coursewrk check box on the Packaging Status Summary page is checked.</p> <p>Additional Unsubsidized Eligibility indicator tag reports a <i>true</i> value.</p>
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PNote Print Information

Loan Destination Nbr (loan destination number)	Represents the EDI destination. Select the number that corresponds to direct loan COD.
Loan Print Option	<p>Determines where the promissory note is printed. Select one of the following values:</p> <p><i>Dest Prints (return to school)</i>: Select this option to specify that the COD (the destination) prints the promissory note and sends it to the school. The school then sends the promissory note to the borrower.</p> <p><i>Dest Prints (send to Borr)</i>: Select this option to specify that the COD (the destination) prints the promissory note and sends it to the borrower.</p> <p><i>Dest Reprint</i>: Select this option to specify that the COD (the destination) is reprinting a promissory note that was printed previously.</p> <p><i>School Prints</i>: Select this option to specify that the school prints the promissory note and sends it to the borrower.</p>
Loan Orig Ack Pnote Status (loan origination acknowledgement promissory note status)	<p>Displays the current status of the promissory note associated with the loan. Values are <i>Accepted</i>, <i>Ack Pend</i> (acknowledgement pending), and <i>Rejected</i>. The loan origination acknowledgement updates this field if the PNOTE status has been previously accepted by the COD, if a PNOTE is required. The create PNOTE process sets this field to <i>Ack Pend</i> when the PNOTE is generated. The PNOTE acknowledgement then sets this field to <i>Accepted</i> or <i>Rejected</i>.</p>
DL Disclosure Print (direct loan disclosure print)	Specifies whether the <i>COD</i> or <i>School</i> prints the disclosure. You can also select <i>Reprint</i> to indicate the disclosure was reprinted. Select <i>COD</i> unless the school has a custom print solution. Financial Aid does not support disclosure printing.
DL Pnote Unique ID (direct loan promissory note unique ID)	<p>Displays the unique identifier assigned to the promissory note that is attached to the loan. The loan origination acknowledgement and the PNote acknowledgement files update this value.</p> <p>Beginning with 2003-2004, the direct loan application processing supports master promissory note requirements for the PLUS loan types. The system adds the letter "N" to the ID to indicate that the loan is PLUS Loan MPN. The system adds the letter "M" to indicate that the loan is a Stafford (subsidized or Unsubsidized) Loan MPN.</p>

Loan Credit Information

These fields are used when a credit check is necessary for loan approval. This occurs with PLUS loans.

Loan Credit Eligibility Displays the current status of the credit check. Values are *A-Credit Approved*, *D-Credit Denied*, or *X-Credit Pending*.

Loan Credit Decision Dt Displays the date that the Loan Credit Eligibility decision occurs.
(loan credit decision date)

Loan Credit Override Use to override the Loan Credit Eligibility status received from the lender. If you use this field to override a credit value, you must then update the DL Disbursement Status on the Direct Loan Override page (Financial Aid, Loans, Direct Lending Management, Override Processing Status).

The following table explains loan credit values.

<i>Loan Credit Value</i>	<i>Explanation</i>
<i>C – C O New Info</i> (credit override, new information)	Changes the Loan Credit Eligibility to Credit Approved.
<i>D – Credit Denied</i>	Changes the Loan Credit Eligibility to Credit Denied.
<i>E – CO Endorser OK</i> (credit override, OK by endorser)	Changes the Loan Credit Eligibility to Credit Approved.
<i>N – Denied after Pending</i>	Changes the Loan Credit Eligibility to Credit Denied.
<i>X – Credit Pending</i>	Changes the Loan Credit Eligibility to Credit Pending.

Processing and Reviewing Financial Data

Access the Application Financial page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Financial).

Application Bio/Demo		Application Misc Data		Application Financial					
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV					
Career:	UGRD	Undergraduate	Aid Year:	2009					
Loan Type:	DSUB	DIRECT SUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary				
Loan Application Data									
Acad Year Start Date:	08/11/2008	Loan Period Start:	08/30/2008	<input type="checkbox"/> Override Loan Dates					
Academic Year End Date:	06/26/2009	Loan Period End:	05/08/2009	<input type="checkbox"/> Override Loan Period					
				Loan Certification Date:	10/31/2008				
Origination Detail									
				Find	First	1 of 1	Last		
Item Type:	900000000311	Direct Sub Stafford	Loan Certified Amount:	\$1,200.00					
Ln App ID:	539900728S09G01315001	DL Orig Fee:	3.000%	Request Amount:	\$1,200.00				
Disb ID	LOC Antic ID	LOC Actual ID	Ovrd Disb Dt	Antc Date	Ln Dsb Amt	Ln Fee Amt	Rebate Amt	Net Disb	Loan Paid
01	01		<input type="checkbox"/>	08/20/2008	\$600.00	\$18.00	9.00	\$591.00	<input type="checkbox"/>
11	02		<input type="checkbox"/>	01/14/2009	\$600.00	\$18.00	9.00	\$591.00	<input type="checkbox"/>

Application Financial page

Loan Application Data

Acad Year Start (academic year start) and **Academic Year End Date** These fields display the start and end dates for the academic year. These values are derived from the Aid Year table and can only be changed there.

Loan Period Start Displays the start date for the loan period. This date is generated from the Valid Careers for Terms table. This date is derived using the first day of the first term in which the anticipated distribution of the student's award is to be made.

Loan Period End Displays the end date for the loan period. This date is generated from the Valid Careers for Terms table. This date is derived using the last day of the final term in which the anticipated distribution of the student's award can be made.

Override Loan Dates Select to override and edit the loan dates. The dates are for this loan record only. When you select the check box, the date fields become available. After you edit the date fields, you must save the record.

Override Loan Period This check box is accessible only after you select the Override Loan Dates check box. Select to change the start and end dates for the loan period. In addition, when you select this check box you prevent loan adjustments from updating the changes you made to the loan period start and end dates.

Loan Certification Date Indicates the date that the loan is originated.

Origination Detail

Item Type	Displays the financial aid item type and description for the loan. If available, click the link next to this field to access the Award Entry and the Award Activity pages.
Ln App ID (loan application ID)	Displays the unique identifier that the Loan Origination process generated for this loan.
DL Orig Fee (direct lending origination fee)	Displays the fee charged to the borrower to originate the loan.
Loan Certified Amount	Displays the amount approved for the loan. This value is derived from the offer/accept amount for the award.
Request Amount	Displays the Accepted amount for the award and represents the Scheduled Disbursement Amount.
Disb ID (disbursement ID)	Displays the disbursement ID given to this disbursement in awarding. When a direct loan is awarded, the disbursement IDs in awarding are not necessarily sequential. The values are 01 through 20.
LOC Antic ID (common origination and disbursement anticipated ID)	Displays the numerically ordered disbursement ID, without skipping numbers. The system converts the disbursement ID. The COD requires that disbursements to be sequentially ordered. This number does not change throughout the processing and is sent to the COD with the origination file.
LOC Actual ID (common origination and disbursement actual ID)	Displays the actual order in which the disbursement was made. This field is empty until the loan is disbursed to Student Financials. The system converts disbursements that are out of sequence. This field is populated when the authorization and disbursement processes are completed and the Direct Loan Out for the Disbursement Process has been run. The COD Actual ID is what is sent to the COD with the Disbursement file.
Ovrd Disb Dt (override disbursement date)	Select to override and change the current requested disbursement date. If you select this check box and edit the field, the new value remains in effect regardless of future adjustments.
Antc Date (anticipated date)	Displays the anticipated date for this loan disbursement. This date is derived from the disbursement date specified in the Disbursement ID table.
Ln Dsb Amt (loan disbursement amount)	Displays the gross scheduled disbursement amount. This value is derived from the Accepted balance on the award disbursement.
Ln Fee Amt (loan fee amount)	Displays the fee amount associated with the scheduled disbursement. This amount is derived from the Accepted fee balance.
Rebate Amt (amount)	Displays the interest rebate fee amount. The system populates this field from packaging fee information.

Net Disb (net disbursement)

Displays the amount scheduled for disbursement to the student. This value equals the loan disbursement amount minus the loan fee amount plus any rebate amount.

Loan Paid

This check box is selected when the loan funds are disbursed to the student's account.

Processing and Reviewing Loan Application Acknowledgement Data

Access the Application Acknowledgement page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Acknowledgement).

Disb ID	LOC Antic ID	LOC Actual ID	Ln Dsb Amt	Ln Fee Amt	Rebate Amt	Net Disb	Antc Date
01	01		\$600.00	\$18.00	9.00	\$591.00	08/20/2008
11	02		\$600.00	\$18.00	9.00	\$591.00	01/14/2009

Application Acknowledgement page

To perform one of the following actions, select the appropriate option and click the Update Origination button.

Hold Loan

Select this option to manually change the loan processing status to *Hold*. Selecting this option suspends processing for this loan record. If you set a loan on hold, the system generates an exception message for this activity on the Loan Exception Messages page. After the exception message is generated, you can enter a comment for audit purposes.

Remove Hold

Select this option to manually remove a hold from a student's loan and permit loan processing to continue. If you remove a loan from hold, the system generates an exception message for this activity on the Loan Exception Messages page. After the exception message is generated, you can enter a comment for audit purposes.

Origination Detail

Activate Change	Click this button to have the Loan Adjustment process review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Adjustment process here. Click the Activate Change button to start the Loan Adjustment process for other data changes (for example, the student or borrower name).
Loan Process Status	<p>Displays the current status of the loan. Values are:</p> <p><i>Cancelled:</i> Not used for Direct Lending.</p> <p><i>Hold:</i> Indicates the COD rejected an activity or a user manually set the loan status to Hold. The system suspends all loan processing until the hold is removed.</p> <p><i>Offered and Not Accepted:</i> Indicates that a loan transmission based on an offer is not transmitted until the award is accepted.</p> <p><i>Origination Pending:</i> Indicates a pending origination that has not been transmitted to the COD.</p> <p><i>In Service:</i> Indicates the loan has been transmitted to the COD.</p> <p><i>Terminated:</i> Indicates the award is cancelled and the Offer amount is set to zero prior to transmission to the COD.</p>
Loan Orig Trans Stat (loan origination transmission status)	<p>Indicates the current status of the loan origination. Values are:</p> <p><i>Accepted:</i> Indicates the COD has accepted the loan.</p> <p><i>Change Pending Transmission:</i> Indicates an adjustment generated a change transaction that has not been sent to the COD. Any further changes entered alter the change record until the transmission occurs.</p> <p><i>Error:</i> Represents an acknowledgement from the COD indicating a rejection of an origination or origination change record.</p> <p><i>Origination Pending Transmission:</i> Indicates an Origination that has not been transmitted to the COD.</p> <p><i>Transmitted:</i> Indicates that an acknowledgement from the COD is due regarding an origination or an origination change record. All loan change activity is suspended until the acknowledgement arrives.</p>
Misc Loan Detail (miscellaneous loan detail)	Click to access the Miscellaneous Loan Detail page, where you can review printing information, origination fees, and academic year start/end dates.
Eligibility Detail	Click to access the Loan Eligibility Detail page, where you can review information on the student's loan eligibility.
Borrower Detail	Click to access the Borrower Detail page, where you can review the borrower's demographic information.
Student Detail	Click to access the Student Detail page, where you can review the student's demographic information.

Name Detail Click to access the Name Detail page, where you can review the name on the loan.

Address Detail Click to access the Address Detail page, where you can review or override the address for the loan.

Anticipated Tab

For definitions of the fields that appear on this tab, see Processing and Reviewing Financial Data.

Acknowledged Tab

Select the Acknowledged tab.

Application Acknowledgement

ID: FAD0125 **Lai, Jessica E** **Institution:** PSUNV
Career: UGRD **Undergraduate** **Aid Year:** 2009
Loan Type: DSUB **DIRECT SUBSIDIZED STAFFORD** **Appl Seq:** 1 [Loan Status Summary](#)

☐ Hold Loan ☐ Remove Hold [Update Origination](#)

Origination Detail Find | View All First 1 of 1 Last

[Activate Change](#) **Loan Process Status:** Origination Pending [Misc Loan Detail](#) [Borrower Detail](#) [Name Detail](#)
Loan Orig Trans Stat: Orig Pending Transmission [Eligibility Detail](#) [Student Detail](#) [Address Detail](#)

Anticipated **Acknowledged**

Disb ID	LOC Antic ID	LOC Actual ID	Ack Antc Gr	Ack Antc Net	Ack Dsb Date	Ln Paid Dt
01	01					
11	02					

Application Acknowledgement page: Acknowledged tab

Ack Antc Gr
(acknowledged anticipated gross) Displays the acknowledged anticipated gross disbursement amount, as acknowledged by the COD. This amount is derived from the offer balance on the award. The sum of the anticipated gross amounts for this loan equals the loan certified amount.

Ack Antc Net
(acknowledged anticipated net) Displays the acknowledged anticipated net amount, which represents the maximum disbursement for the student, as acknowledged by the COD. This amount is equal to the difference between the anticipated gross and the anticipated fee amounts.

Ack Dsb Date
(acknowledged disbursement date) Displays the acknowledged disbursement date, which is the expected disbursement date, as specified on the acknowledgment record.

Ln Paid Dt (loan paid date)

Displays the actual date of the disbursement after the loan funds are disbursed to the student's account and the Loan Paid check box is selected.

Viewing Miscellaneous Loan Details

Access the Miscellaneous Loan Detail page (click the Misc Loan Detail link on the Application Acknowledgement page).

Miscellaneous Loan Detail

Loan Type:

DSUB

DIRECT SUBSIDIZED STAFFORD

Appl Seq:

1

ORIGINATED

ACKNOWLEDGED

Loan Print Option:

School Prints

DL Disclosure Print:

LOC

DL Origination Fee %:

3.000

Academic Year Start Date:

08/11/2008

Academic Year End Date:

06/26/2009

Miscellaneous Loan Detail page

The field values are derived from the Origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If your institution has not received an acknowledgement or the Origination is rejected, only the ORIGINATED section is complete.

Viewing Loan Eligibility Details

Access the Loan Eligibility Detail page (click the Eligibility Detail link on the Application Acknowledgement page).

Loan Eligibility Detail			
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	
Appl Seq:	1	ORIGINATED	ACKNOWLEDGED
Loan Period Start:	08/30/2008		
Loan Period End:	05/08/2009		
Depend Stat (Fed):	Indepndnt		
Program Completion Dt:	05/08/2014		
NSLDS Loan Year:	Graduate/Professional		
Direct Lending Year:	First Yr, Grad/Prof		
	<input type="checkbox"/> HEAL Eligible	<input type="checkbox"/> HEAL Eligible	
	<input type="checkbox"/> Additional Unsub Eligibility	<input type="checkbox"/> Additional Unsub Eligibility	
	<input type="checkbox"/> PreProfessional Coursework Eligible	<input type="checkbox"/> PreProfessional Coursework Eligible	

Loan Eligibility Detail page

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If an acknowledgement has not been received or the origination is rejected, only the ORIGINATED section is complete.

Viewing Borrower Details

Access the Borrower Detail page (click the Borrower Detail link on the Application Acknowledgement page).

Borrower Detail	
Loan Type:	DUSB DIRECT UNSUBSIDIZED STAFFORD
Appl Seq:	1 ORIGINATED ACKNOWLEDGED
Borrower SSN:	608-30-0547
Borrower Date of Birth:	01/10/1984
Borrower Citizenship Stat:	Native
Borrower Visa/Permit Nbr:	
Telephone:	973/259-9586
Borr Default / Owes Refund:	No

Borrower Detail page

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the ORIGINATED section is complete.

Viewing Student Details

Access the Student Detail page (click the Student Detail link on the Application Acknowledgement page).

Student Detail

Loan Type:

DGPL

DL Graduate PLUS

Appl Seq:

1

ORIGINATED

ACKNOWLEDGED

Social Security #:

608-30-0547

Date of Birth:

01/10/1984

Citizenship Status:

Native

Visa/Permit Number:

Stdnt Default / Owes Refund:

No

Student Detail page

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the ORIGINATED section is complete.

Viewing Name Details

Access the Name Detail page (click the Name Detail link on the Application Acknowledgement page).

Name Detail

Loan Type:

DUSB

DIRECT UNSUBSIDIZED STAFFORD

Appl Seq:

1

ORIGINATED

ACKNOWLEDGED

Find | View All

First

1 of 1

Last

Loan Name Type:

Borrower

First Name:

Peter

Middle Initial:

R

Last Name:

Hutt

Name Detail page

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the ORIGINATED section is complete.

Viewing Address Details

Access the Address Detail page (click the Address Detail link on the Application Acknowledgement page).

Address Detail	
Loan Type:	DUSB DIRECT UNSUBSIDIZED STAFFORD
Appl Seq:	1 ORIGINATED ACKNOWLEDGED
Find View All First 1 of 2 Last	
<input type="checkbox"/> Override Address	Loan Address Type: Mailing
Country:	USA
Address Line 1:	4305 Shelbourne Lane
City:	Columbus
State:	OH
Postal Code:	43220

Address Detail page

The field values are derived from the origination record and Direct Loan Application component. If the COD has sent an acknowledgment, the ORIGINATED and ACKNOWLEDGED sections are completed. If your institution has not received an acknowledgement or the origination is rejected, only the ORIGINATED section is complete.

Viewing and Overriding Bio/Demo Data for Direct Lending

This section discusses how to:

- View direct loan name information.
- Override direct loan phone information.
- View direct loan address information.
- Override direct loan email information
- Override direct loan application information.

Changes you make here do not change the Campus Community data. You must save changes to data made on these pages. To commit the data you override to the Origination file and application pages, go to Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Direct Loan Application, App Acknowledgement and click the Activate Change button. Then re-run Origination with adjustments.




Note. The system sends Bio/Demo data to the COD. If you choose to override data on any of these pages, ensure the changes are accurate. If the student has more than one Stafford loan type such as a subsidized and unsubsidized loan and if both loans are originated at the same time, you must ensure that changes made on one loan type are carried through and made for the other loan type.

Pages Used to Override Bio/Demo Data for Direct Lending

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Loan Name	LOAN_NAME	Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Name	View the current name information on a direct loan record. This is a view only page.
Direct Loan Phone	LOAN_PHONE	Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Phone	Override telephone information on the direct loan record.
Direct Loan Address	LOAN_ADDRESS	Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Address	View address information on the direct loan record.
Direct Loan Email	LOAN_EMAIL	Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Email	Override email information on the direct loan record. For direct lending, the email address is restricted to 50 characters and must follow email address identification protocol.
Direct Loan Demo Ovr	LOAN_DMO_OVRD_DL	Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Demo Ovr	Override Campus Community or institutional application information.

Viewing Direct Loan Name Information

Access the Direct Loan Name page (Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Name).

Direct Loan Name		Direct Loan Phone	Direct Loan Address	Direct Loan Email	Direct Loan Demo Ovr
ID:	FAD0125	Lai,Jessica E	Institution:	PSUNV	   Loan Status Summary
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	
<div>Find View All First 1 of 1 Last</div>					
<div> Loan Name Type: Borrower First Name: Jessica Middle Initial: E Last Name: Lai </div>					

Direct Loan Name page

The system displays the ID,Career,Loan Type,Institution,Aid Year, and Appl Seq (application sequence).

The Loan Name Type and the full name of the borrower are displayed. If multiple name types are associated with the loan, all are displayed. These fields are display only.

Overriding Direct Loan Phone Information

Access the Direct Loan Phone page (Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Phone).

Direct Loan Name		Direct Loan Phone	Direct Loan Address	Direct Loan Email	Direct Loan Demo Ovr
ID:	FAD0125	Lai,Jessica E	Institution:	PSUNV	   Loan Status Summary
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	
<div> Telephone: <input type="text" value="614/459-3245"/> <input type="checkbox"/> Override Phone # </div>					

Direct Loan Phone page

Telephone

Displays the current telephone number for the borrower. This phone number originates from Campus Community. This field is display only until you select the Override Phone check box.

Override Phone

Select to override the current phone number on the loan record only. Selecting the check box activates the Telephone field. If you override this phone number, future adjustments to Campus Community information do not update this field. If you clear this check box, the system reinserts the telephone number originating from Campus Community.

Viewing Direct Loan Address Information

Access the Direct Loan Address page (Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Address).

Direct Loan NameDirect Loan PhoneDirect Loan AddressDirect Loan Email

ID: FAD0125Lai, Jessica EInstitution: PSUNV

Career: UGRDUndergraduateAid Year: 2009

Loan Type: DUSBDIRECT UNSUBSIDIZED STAFFORDAppl Seq: 1

FindView AllFirst1 of 2Last

Loan Address Type: Mailing

Country: USAUnited States

Address: 4305 Shelbourne LaneColumbus, OH 43220

Direct Loan Address page

Loan Address Type

Specifies the type of address displayed.

Country

The address fields change depending on the country you select. You can only select a country if you select the Override Address check box.




Note. To make address changes, use the Addresses page in Campus Community (Managing Biographical Information, Managing Addresses and Phone, Addresses).

Overriding Direct Loan Email Information

Access the Direct Loan Email page (Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Email).

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Direct Loan Name		Direct Loan Phone		Direct Loan Address		Direct Loan Email		Direct Loan Demo Ovr	
ID:	FAD0125	Lai, Jessica E		Institution:	PSUNV		  		
Career:	UGRD	Undergraduate		Aid Year:	2009				
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD		Appl Seq:	1		Loan Status Summary		
<input type="text" value="HCMGENUser1@ap6023fems.us.oracle.com"/>								<input type="checkbox"/> Override Email Address	

Direct Loan Email page

Override Email Address Select to override the student's email address. Enter the updated or changed email address in the field. If you override the student's email address, future adjustments to Campus Community information do not update this field. If you clear this check box, the system reinserts the email information originating from Campus Community.

Overriding Direct Loan Application Information

Access the Direct Loan Demo Ovr page (Financial Aid, Loans, Direct Lending Management, Override Loan Application Data, Direct Loan Demo Ovr).

Direct Loan Phone		Direct Loan Address		Direct Loan Email		Direct Loan Demo Ovr	
ID:	FAD0125	Lai, Jessica E		Institution:	PSUNV		  
Career:	UGRD	Undergraduate		Aid Year:	2009		
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD		Appl Seq:	1		Loan Status Summary
Borrower ID: FAD0125		Jessica Lai					
<input type="checkbox"/> Override Borrower SSN	Borr SSN:	<input type="text" value="539-90-0728"/>					
<input type="checkbox"/> Override Academic Year Start	Academic Year Start Date:	<input type="text" value="08/11/2008"/>					
<input type="checkbox"/> Override Academic Year End	Academic Year End Date:	<input type="text" value="06/26/2009"/>					
<input type="checkbox"/> Override Dependency Status	Depend Stat (Fed):	<input type="text" value="D"/>					
<input type="checkbox"/> Override Borrower BirthDate	Borr DOB:	<input type="text" value="03/21/1986"/>					
<input type="checkbox"/> Override Borrower Citizenship	Borrower Citizenship Stat:	<input type="text" value="1"/>					
<input type="checkbox"/> Override Borrower Alien Reg	Borrower Visa/Permit Nbr:	<input type="text"/>					

Direct Loan Demo Ovr page

Override Borrower SSN Select to change the borrower's social security number or date for the SSN.

Override Academic Year Start Select to change the start date of the academic year for this borrower.

Override Academic Year End	Select to change the end date of the academic year for this borrower.
Override Dependency Status	Select to change the borrower's federal dependency status.
Override Borrower BirthDate	Select to change the borrower's date of birth and to enter the date you changed the date of birth.
Override Borrower Citizenship	Select to change the borrower's citizenship status. The values acceptable to COD for Borrower Citizenship Stat are: <i>1:Native</i> <i>2:Naturalized</i> <i>3: Alien Permanent</i>
Override Borrower Alien Reg (override borrower alien registration)	Select to change the borrower's alien registration or Visa/permit number.

Note. If you override these required fields, your institution must take full responsibility for the data you submit to the COD that may be in conflict with existing institutional records. Access to this page should be limited to key personnel.

Overriding and Viewing Direct Loan Origination Data and Action Messages

This section discusses how to:

- Override direct loan origination data.
- View direct loan origination action messages.
- Review the loan origination action history.
- Review direct loan disbursement actions.
- Review loan exception messages.




Pages Used to Override and View Direct Loan Origination Data and Action Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Loan Override	LOAN_ORIG_ACK_DL01	Financial Aid, Loans, Direct Lending Management, Override Processing Status, Direct Loan Override	Manually accept a loan origination, manually accept a promissory note, update the disbursement status, put the loan in hold or error status, and remove a hold from the loan.
Direct Loan Orig Actions (direct loan origination actions)	LN_DL_ORIG_INQ	Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions	Review actions and errors pertaining to origination, origination change, and validation.
Direct Loan Disb Actions (direct loan disbursement actions)	LN_DL_DISB_INQ	Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Disb Actions	View the disbursement actions associated with the loan.
Loan Exception Messages	LN_MSG_INQ	Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Loan Exception Messages	View messages pertaining to loan processing, such as why a loan is on hold or explanations for manual overrides performed. The information contained in this page is cumulative for the particular loan.



Overriding Direct Loan Origination Data

Access the Direct Loan Override page (Financial Aid, Loans, Direct Lending Management, Override Processing Status, Direct Loan Override).

Direct Loan Override

ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	  
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary

☐ Accept Orig
 ☐ Accept Promissory Note
 ☐ Remove Hold
 ☐ Update DL Disb Status
 ☐ Error Loan
 ☐ Hold Loan
 [Update Origination](#)

Origination Detail
[Find](#) | [View All](#)
First  1 of 1  Last

[Activate Change](#)
Loan Process Status: Orig Pend
 [Borrower Detail](#)
[Name Detail](#)
[Eligibility Detail](#)

Loan Orig Trans Stat: Orig Pend
 [Student Detail](#)
[Address Detail](#)
[Misc Loan Detail](#)

Disb ID	LOC Antic ID	LOC Actual ID	Ln Disb Amt	Ln Fee Amt	Rebate Amt	Net Disb	Antc Date
01	01		\$470.00	\$14.00	7.00	\$463.00	08/20/2008
02	02		\$470.00	\$14.00	7.00	\$463.00	01/14/2009

Direct Loan Override page

Warning! Use extreme caution when updating loan records with this page. Future processing and dollar amounts are based on these loan amounts and loan statuses.

Note. If you override these required fields, your institution must take full responsibility for the data you submit to the COD that may be in conflict with existing institutional records. Access to this page should be limited to key personnel.

With the exception of the fields listed below, the fields on this page are the same as those on the Application Acknowledgement page.

To perform one of the following actions, select the appropriate option and click the Update Origination button.

Accept Orig (accept origination)

Perform this action only if you do not expect to receive an acknowledgement file from the COD. Selecting this option accepts the current originated loan amounts. The system populates the transmitted fields with the same amount as the originated fields. This is the same as receiving a Loan Origination Acknowledgment file. Selecting this option also manually releases a loan from *Error* status.

Update DL Disb Status (update direct lending disbursement status)

If you select this option, the system reevaluates the disbursement status for a student. Perform this action when you manually override the credit status for a PLUS loan type or you change the switches on the loan type.

Accept Promissory Note Select this option to override a promissory note acknowledgement by manually accepting a promissory note. Use this option if you did not or do not expect to receive a promissory note acknowledgement from the COD or if the promissory note was rejected and you want to authorize a disbursement and report and transmit the disbursed award to the COD on behalf of the borrower.

When you click the Update Origination button, the system does the following:

- The system checks the Loan Pnote Stat (promissory note status) field. If the status value is *Accepted*, no further processing occurs. If status is not *Accepted*, the system checks to see if a promissory note record has been created. If no promissory note record exists, the system creates an entry in the promissory note table for this loan.
- The system updates the promissory note status on both the promissory note table and on the loan origination record to *A - Accepted*.
- The system inserts an entry into the promissory note action table to indicate that the promissory note was manually accepted. You can view this information on the Direct Loan PNote page (Financial Aid, Loans, Direct Lending Management, Review Promissory Note Actions, Direct Loan PNote) or on the (view only) Direct Loan PNote Action page (Financial Aid, Loans, Direct Lending Management, View Promissory Note Actions, Direct Loan PNote Action).
- The system inserts a message into the Loan Exception Messages page (Financial Aid, Loans, Direct Lending Management, Loan Exception Messages) indicating that the promissory note was manually accepted. You can make additional comments to explain why you manually accepted the promissory note.
- The system reevaluates the disbursement status. If the promissory note was the only criteria keeping the loan from being disbursed, the system updates the appropriate fields to allow for the disbursement of the loan funds.

Important! Use the promissory note acknowledgement override with caution. If the COD rejects a promissory note after you have overridden the promissory note acknowledgement the loan's status is unbooked. To get the loan to a booked status and properly disburse the funds, this situation must be resolved directly with the COD.

Error Loan

Perform this action only if you do not expect to receive an acknowledgement file from the COD. Selecting this option changes the Orig Trans Stat (origination transmission status) to *Error*. This simulates receiving an COD Acknowledgement that rejects the origination or origination change record. This results in loan adjustments reevaluating the loan for changes based on the current acknowledgement values.

Note. When you perform any of the above actions, the system generates an exception message that you can review on the Loan Exception Messages page. You are encouraged to note exceptions by adding your own detail.




Viewing Direct Loan Origination Action Messages

The Direct Loan Actions Inquiry component is view only and is designed to provide status and processing information to staff who may or may not be directly involved with the processing of Direct Lending files, but may need access to direct lending information.

You use the DL Actions Inquiry component to view origination and disbursement action history and loan exception messages.

Reviewing the Loan Origination Action History

Access the Direct Loan Orig Actions page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions).

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	  
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Find View All First 1 of 1 Last					
DL UNSUB LOAN	Loan Process Status:	Orig Pend	Total Certified Loan Amount:	\$940.00	
Item Type: 900000000312	Loan Orig Trans Stat:	Orig Pend	Borrower Requested Amount:	\$940.00	
Actions		CRC Lender Information			
Seq	Description	Action Status	Status Date	Loan Action Dttm	
1	Loan Originated	Pending	10/31/2008	10/31/2008 1:27:54PM	

Direct Loan Orig Actions page

The system displays the ID, Career, Loan Type, Institution, Aid Year, and Appl Seq (application sequence) values. The application sequence number increases each time the system creates a new loan origination record for each ID, career, loan type, institution, and aid year combination.

The following fields are derived from the Loan Origination record.

Item Type Displays the financial aid item type associated with this loan.

Loan Process Status	<p>Displays the current status of the loan. Values are:</p> <p><i>Cancelled:</i> Not used for direct lending.</p> <p><i>Hold:</i> Indicates the COD rejected an activity or a user manually set the loan to hold status. The system suspends all loan processing until the hold is removed.</p> <p><i>Offered and Not Accepted:</i> Indicates that a loan transmission based on an offer is not be transmitted until the award is accepted.</p> <p><i>Origination Pending:</i> Indicates a pending origination that has not been transmitted to the COD.</p> <p><i>In Service:</i> Indicates the loan has been transmitted to the COD.</p> <p><i>Terminated:</i> Indicates the award is cancelled and the Offer amount is set to zero prior to transmission to the COD.</p>
Loan Orig Trans Stat (loan origination transaction status)	<p>Indicates the current status of the loan origination. Values are:</p> <p><i>Accepted:</i> Indicates the COD has accepted the loan.</p> <p><i>Change Pending Transmission:</i> Indicates an adjustment generated a change transaction that has not been sent to the COD. Any further changes entered alter the change record until the transmission occurs.</p> <p><i>Error:</i> Represents an acknowledgement from the COD indicating a rejection of an origination or origination change record.</p> <p><i>Origination Pending Transmission:</i> Indicates an Origination that was not transmitted to the COD.</p> <p><i>Transmitted:</i> Indicates that an acknowledgement from the COD is due regarding an origination or an origination change record. The system suspends all loan change activity until the acknowledgement arrives.</p>
Total Certified Loan Amt (total certified loan amount)	Indicates the amount approved for the loan. This value is derived from the offer amount on the Award.
Borrower Requested Amount	Derived from the Accepted Amount on the Award and represents the Certified Amount to be reported to the COD.

Actions Tab

Seq (sequence)	Displays the origination action sequence generated from the loan record activity. When multiple sequences exist for a loan, they display in reverse order. In other words, the most recent sequence displays at the top.
-----------------------	--

Description	<p>Displays the description of the action. Values are:</p> <p><i>Accepted Orig</i></p> <p><i>Rejected Orig</i></p> <p><i>Accepted Orig/Credit Chk PLUS only</i></p> <p><i>Acpt Orig/Credit Chk Denied PLUS only</i></p> <p><i>Loan Originated</i></p> <p><i>Orig Change</i></p> <p><i>Manually Accepted</i></p> <p><i>Manually Rejected</i></p> <p><i>Rejected</i></p>
Action Status	<p>Displays the current status of the action. Values are:</p> <p><i>Accepted</i></p> <p><i>Ac-NtApld</i> (accepted-not applied)</p> <p><i>Authorized</i></p> <p><i>Failed</i></p> <p><i>Invalid</i></p> <p><i>Pending</i></p> <p><i>Received</i></p> <p><i>Rejected</i></p> <p><i>Transmitted</i></p> <p>The action status for an acknowledgement is always <i>Received</i>. If the COD rejects an origination or origination change record, the system creates a new <i>Loan Originated</i> row to track the re-submission of the failed/rejected action.</p>
Status Date	<p>For actions representing received information, the action status date is the COD acknowledgement date. For actions representing transmitted information, this date is the date the action is created.</p>
Loan Action Dttm (loan action date/time)	<p>For actions representing received information, the action date time field displays the date and time the acknowledgement is loaded to the system. For actions representing sent information, this field displays the date and time the transmission was sent.</p>

CRC Lender Information Tab

Select the CRC Lender Information tab.

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Find View All First 1 of 1 Last					
DL UNSUB LOAN		Loan Process Status:	Orig Pend	Total Certified Loan Amount:	\$940.00
Item Type: 9000000000312		Loan Orig Trans Stat:	Orig Pend	Borrower Requested Amount:	\$940.00
Actions		CRC Lender Information			
Instance	User				
877	PS				

Direct Loan Orig Actions page: CRC Lender Information tab

Instance Displays the unique identifier assigned to the particular process that created the action row.

User Displays the user ID for the individual who processed the action.

Explaining Direct Loan Origination Status and Action Codes

This section provides an explanation of the Direct Lending Status Codes for origination. This includes the processes run and the actions that generate each status code. The fields referenced in the following table display on the Direct Loan Orig Actions page.

Loan Processing Status	Loan Origination Transmission Status	Loan Origination Action	Loan Origination Action Status	Status/Action Explanation
Orig Pend	Orig Pend	Loan Originated	Pending	You have not transmitted the loan to the COD. Any changes that you make to the source data are applied to the loan record by the loan adjustments. The system does not create a change transaction.

<i>Loan Processing Status</i>	<i>Loan Origination Transmission Status</i>	<i>Loan Origination Action</i>	<i>Loan Origination Action Status</i>	<i>Status/Action Explanation</i>
In Service	Trans	Loan Originated	Transmitted	You have run the Direct Loan Outbound process and sent the loan origination or loan origination change records to the COD. The system suspends Loan Origination Change Processing until you receive the acknowledgement from the COD. The system updates the action status.
In Service	Accepted	Accepted Orig, Accepted Orig/Credit Chk, Acpt Orig/Crdt Chk Denied, or Acpt Orig/Crdt Chk Pending	Received	You received an origination acknowledgement and the COD accepted the loan origination. The system inserts a new origination action. If you change the origination data, the system generates an origination change record.
Hold	Orig Pend	Rejected Orig	Received	You received an origination acknowledgement from the COD and ran COD Inbound. The COD rejected the origination. The system inserts two new actions (Rejected Orig and Loan Originated).

<i>Loan Processing Status</i>	<i>Loan Origination Transmission Status</i>	<i>Loan Origination Action</i>	<i>Loan Origination Action Status</i>	<i>Status/Action Explanation</i>
Hold	Orig Pend	Loan Originated	Pending	As a result of the previous action, the system inserts a new loan origination action to resubmit the origination.
Terminated	Origination Pending			The award was cancelled/declined before transmitting the loan origination to the COD.

Explaining Direct Loan Origination Change Status and Action Codes




This section provides an explanation of the Direct Lending Status Codes for Origination Change. This includes the processes run and the actions that generate each status code. The fields referenced in the following table display on the Direct Loan Orig Actions page.

<i>Loan Processing Status</i>	<i>Loan Origination Transmission Status</i>	<i>Loan Origination Action</i>	<i>Loan Origination Action Status</i>	<i>Status/Action Explanation</i>
In Service	Change Pend	Orig Change	Pending	You changed origination data after the COD accepted the origination; therefore, the Loan Adjustment process created an origination change record. The Origination program inserts a new origination action.
In Service	Transmitted	Orig Change	Transmitted	You have transmitted an origination change and the origination program inserts a new origination action.

<i>Loan Processing Status</i>	<i>Loan Origination Transmission Status</i>	<i>Loan Origination Action</i>	<i>Loan Origination Action Status</i>	<i>Status/Action Explanation</i>
In Service	Accepted	Orig Change	Accepted	You received an origination acknowledgment from the COD and the origination change is accepted. The Origination program inserts a new origination action.
Hold	Error	Orig change	Rejected	You received an origination change acknowledgement from the COD that rejects the origination change. The Origination program inserts a new origination action.

Reviewing Direct Loan Disbursement Actions

Access the Direct Loan Disb Actions page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Disb Actions).

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	  
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Find First 1 of 1 Last					
DL UNSUB LOAN		Loan Process Status:	Orig Pend	Total Certified Loan Amt:	\$940.00
Item Type	9000000000312	Loan Orig Trans Stat:	Orig Pend	Borrower Requested Amount:	\$940.00
Find View All First 1 of 2 Last					
Disbursement ID: 01		Loan Disb Trans Stat: Disb Pending			
Actions		Details CRC Lender Information			
Seq	Description	Action Status	Loan Action Status Date		
1	Anticipated Disbursement	Pending	10/31/2008		

Direct Loan Disb Actions page

The item type, status, and amount fields are the same as those on the Direct Loan Orig Actions page.

Disbursement ID Displays the ID number assigned to this particular disbursement.

Loan Disb Trans Stat Indicates the status for this disbursement. Values are:

(loan disbursement transaction status)

Accepted

Chg Pend (change pending)

Actual (actual disbursement)

Error

Disb Pend (disbursement pending) *Trans* (transmitted)

Actions Tab

Seq (sequence) Displays the disbursement action sequence generated from the loan record activity. When multiple sequences exist for a loan, the most recent sequence appears at the top.

Description Displays the description of the disbursement action type. The values are:

- Adjusted Disbursement*
- Canceled Disbursement*
- Actual Disbursement*
- Booking Disbursement*
- Booking Adjustment*
- Anticipated Disbursement*
- Servicer Refund*
- Disbursed to Student Account*

Action Status Displays the current status of the disbursement action. The values are:




- Accepted*
- Ac-NtApld* (accepted-not applied)
- Authorized*
- Failed*
- Invalid*
- Pending*
- Received*
- Rejected*
- Transmitted*

The action status for an Acknowledgement is always *Received*.

Loan Action Status Date For actions representing received information, displays the COD acknowledgement date. For actions representing transmitted information, this is the date the action is created.

Details Tab

Select the Details tab.

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2009	  
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Find First 1 of 1 Last					
DL UNSUB LOAN		Loan Process Status:	Orig Pend	Total Certified Loan Amt:	\$940.00
Item Type	900000000312	Loan Orig Trans Stat:	Orig Pend	Borrower Requested Amount:	\$940.00
Find View All First 1 of 2 Last					
Disbursement ID: 01		Loan Disb Trans Stat: Disb Pending			
Actions		Details		CRC Lender Information	
Loan Action Dttm	Loan Disb Action Amt	Loan Disb Action Fee	Loan Disb Action Net	Loan Disb Action Adj	
10/31/2008 1:27:54PM	\$470.00	\$14.00	\$463.00	\$0.00	

Direct Loan Disb Actions page: Details tab

Loan Action Dttm (loan action date/time) For actions representing received information, the action date time is the date/time the acknowledgement is loaded to the system. For actions representing sent information, this is the date and time the transmission is sent.

Loan Disb Action Amt (loan disbursement action amount) Displays the gross disbursement amount.

Loan Disb Action Fee (loan disbursement action fee) Displays the loan fee amount for the disbursement.

Loan Disb Action Net (loan disbursement action net) Displays the net disbursement amount, minus fees, plus rebate.

Loan Disb Action Adj (loan disbursement action adjustment) Displays the adjusted disbursement amount reported.

CRC Lender Information Tab

Select the CRC Lender Information tab.

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2009	
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
Find First 1 of 1 Last					
DL UNSUB LOAN		Loan Process Status:	Orig Pend	Total Certified Loan Amt:	\$940.00
Item Type	9000000000312	Loan Orig Trans Stat:	Orig Pend	Borrower Requested Amount:	\$940.00
Find View All First 1 of 2 Last					
Disbursement ID: 01		Loan Disb Trans Stat: Disb Pending			
Actions		Details			
CRC Lender Information					
Direct Lending Booked Status	Loan Disb Sequence Status	Loan School Cd Status	Loan Disbursement Status	Loan ID Status	User ID
Unbooked				677	PS

Direct Loan Disb Actions page: CRC Lender Information tab

Direct Lending Booked Status Displays *Booked* if the COD has accepted and acknowledged the origination, first disbursement, and promissory notes. Until this occurs, the status is *Unbooked*.

Loan Disb Sequence Status (loan disbursement sequence status) Displays one of the following values:
Accepted
Invalid (invalid sequence number)
AlrdyRecv (already received)

Loan School Cd Status (loan school code status) Displays one of the following values: *blank* if the school code is accepted and *I - Invalid* if the school code is invalid.

Loan Disbursement Status Displays one of the following values:
Accepted
Invalid (invalid disbursement)
AlrdyRecv (already received)
Reject

Loan ID Status Displays one of the following values:
I - Invalid Loan Identifier
N - Loan Identifier Not on File
blank - Accepted

Instance Displays the number used by the system to count the occurrences of the processes you run. Use this on the Messages page to select the particular instance of the process.

User ID

Displays the user ID for the individual who processed the action.

Explaining Direct Loan Disbursement Status and Action Codes

This section provides an explanation of the Direct Lending Status Codes for disbursements. This includes the processes run and actions that generate each status code. The fields referenced in the following table are located on the Direct Loan Disb Actions page.

The Loan Disbursement Transaction Status field appears opposite the Disbursement ID. The loan disbursement action status refers to the Action Status field on the page.




<i>Loan Disbursement Transmission Status</i>	<i>Loan Disbursement Action</i>	<i>Loan Disbursement Action Status</i>	<i>Status/Action Explanation</i>
Disb Pend	Anticipated Disbursement	Pending	You originated the loan. This record represents the anticipated disbursement data at the time of disbursement. The Origination program inserts a new disbursement action row.
Disb Pend	Disbursed to Student Account	Received	You authorized and disbursed funds to the students account. The Disbursement program inserts a new disbursement action row.
Transmitted	Actual Disbursement	Transmitted	You transmitted an actual disbursement record to the COD. The Disbursement Outbound program inserts a new disbursement action.
Accepted	Actual Disbursement	Accepted	You received a disbursement acknowledgement from the COD that indicates the disbursement was accepted. The Disbursement Inbound program updates the disbursement action.

<i>Loan Disbursement Transmission Status</i>	<i>Loan Disbursement Action</i>	<i>Loan Disbursement Action Status</i>	<i>Status/Action Explanation</i>
Error	Actual Disbursement	Rejected	You received a disbursement acknowledgement from the COD indicating the disbursement was rejected. The Disbursement program updates the disbursement action.
Transmitted	Adjusted Disbursement	Transmitted	You transmitted an adjusted disbursement record to the COD. The Disbursement Outbound program inserts a new disbursement action.
Accepted	Adjusted Disbursement	Accepted	You received a disbursement acknowledgement from the COD indicating the disbursement adjustment was accepted. The Disbursement Inbound program updates the disbursement action.
Error	Adjusted Disbursement	Rejected	You received a disbursement acknowledgement from the COD indicating the disbursement adjustment was rejected. The disbursement program updates the disbursement action.

<i>Loan Disbursement Transmission Status</i>	<i>Loan Disbursement Action</i>	<i>Loan Disbursement Action Status</i>	<i>Status/Action Explanation</i>
Accepted	Booking Disbursement	Accepted	You received a booking notification from the COD. The booking notification indicates that the loan origination, promissory note and the first actual disbursement are accepted. The booking notification includes the Disbursement Activity Type L booking disbursement, the booked date and the CODs total net booked amount.
Accepted	Booking Adjustment	Accepted	For each disbursement adjustment acknowledgement you receive from the COD, you also receive a booking notification. The booking notification includes the Disbursement Activity Type M booking adjustment, booked date and the CODs total net booked amount.
Accepted	Servicer Refund	Accepted	You received a servicer refund acknowledgement from the COD.

Reviewing Loan Exception Messages

Access the Loan Exception Messages page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Loan Exception Messages).

Direct Loan Orig Actions		Direct Loan Disb Actions		Loan Exception Messages	
ID:	FAD0125	Lai, Jessica E	Institution:	PSUNV	
Career:	UGRD	Undergraduate	Aid Year:	2009	  
Loan Type:	DUSB	DIRECT UNSUBSIDIZED STAFFORD	Appl Seq:	1	Loan Status Summary
					Find First 1 of 1 Last
DL UNSUB LOAN					Item Type: 9000000000312
DateTime	Message				
	<input type="text"/>				Details

Loan Exception Messages page

DateTime	Displays the date and time that the message was created.
Message	Displays the exception message logged for each transaction listed. You can enter further information regarding the exception message using the Loan Message Comment page.
Details	Click this link to view additional message information.

Creating and Using Promissory Notes

Multi-year Master Promissory Notes allow a student to sign and use one promissory note throughout multiple loan years and for multiple schools participating in the multi-year master promissory notes.

All existing 1999-2000 and 2000-2001 master promissory notes, are treated as multi-year promissory notes. Schools that are eligible for multi-year promissory note functionality can use these existing master promissory notes for 2001-2002 loans for the same student. Borrowers who attend a school that is eligible for multi-year functionality are required to have only one master promissory note on file at the COD for all subsidized and unsubsidized loans disbursed for the academic year 2000-2001 and forward. An open master promissory note on file at the COD is assigned to the borrower and can be used by any school eligible for multi-year functionality.

Note. The Social Security Number, date of birth, and first name on the Loan Origination Record must match the same values on the master promissory note, otherwise the COD cannot link the existing master promissory note to the Loan Origination Record.

An open master promissory note is valid for up to ten years from the date of the first anticipated disbursement, if an actual disbursement is made. Students can close open master promissory notes by calling a customer service representative at the COD. After a master promissory note is closed, no new loans can be disbursed without generating a new master promissory note. However, all disbursements and booking activity for the loans already attached to the closed master promissory notes are processed.

Single-year schools are not eligible to use multi-year master promissory notes. For these schools, a borrower must sign a new master promissory note for each academic year. Single-year schools must use a master promissory note generated specifically for that institution. For these schools, subsidized and unsubsidized loans for the same student and the same academic year can be linked to a single master promissory note.

This section discusses how to:

- Create a promissory note communication record.
- Print direct loan master promissory notes.
- Sign and review direct loan promissory notes.
- Create batch signatures for DL promissory notes.

You use the same pages whether you are creating multi-year promissory notes or single year promissory notes.

See Also

Direct Loan Technical Reference

Pages Used to Create and Use Promissory Notes

Page Name	Definition Name	Navigation	Usage
Create DL PNote Communication (create direct loan promissory note communication)	RUNCTL_DLPN02	Financial Aid, Loans, Create PNote Communication, Create DL PNote Communication	Create promissory note communication records for the types of documents defined in the report package selected. The print process that produces the output for the promissory notes reads the communication record.
Print DL Promissory Note (print direct loan promissory note)	RUNCTL_DL_PN_PRT02	Financial Aid, Loans, Print Promissory Note, Print DL Promissory Note	Print promissory notes for direct lending.

Page Name	Definition Name	Navigation	Usage
Direct Loan Pnote (direct loan promissory note)	LN_DL_PNOTE	Financial Aid, Loans, Direct Lending Management, Review Promissory Note Actions, Direct Loan PNote	For an originated loan, indicate when a promissory note has been signed, adjust the status of the promissory note for the loan manifest, reprint the promissory note, create another promissory note, and cancel the promissory note.
DL Batch Signature (direct loan batch signature)	DL_BTCH_PNT	Financial Aid, Loans, Direct Lending Management, Create Signatures in Batch, DL Batch Signature	Record promissory note signatures in batch mode and remove signatures in batch. To record promissory note signatures, select the promissory note IDs and apply the signatures. You can sign a group of promissory notes or individual promissory notes. You can remove the signature from a promissory note.
Loan PNote Selection Criteria (loan promissory note selection criteria)	LN_DL_PNOTE_SLCT	Click the Batch PNote Selection button from the DL Batch Signature page.	Enter criteria to be used to select the promissory notes to sign or unsign.

Creating a Promissory Note Communication Record

Access the Create DL Pnote Communication page (Financial Aid, Loans, Create PNote Communication, Create DL PNote Communication).

Create DL PNote Communication

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Selection Criteria Find | View All First 1 of 1 Last

*Institution: PSUNV	Ln Output Type: External	*Print Option: P Stat	
*Aid Year: 2009	Report Package:	From Date:	
*Career: UGRD	Document Type: Mstr Pnote	Thru Date:	

☐ Student Override

Create DL PNote Communication page

Use this page to run the Create PNote Communication Rec process (FAPLDPN2). You can create direct lending (and non-Direct Lending) promissory note communication records that determine which promissory notes are printed, based on the criteria you enter. The fields in the Selection Criteria group box have a cumulative search effect. Each field that you enter narrows your search criteria.

The DL PNote Create program (FAPLDPN2.CBL) creates one VAR_DATA_LOAN record if it is assigning a Checklist and Communication at the same time and ensures consistent VAR_DATA_LOAN data. When you run the Loan Origination and the DL Pnote Create (FAPLDPN2.CBL) processes, the system populates the fields to be in sync. This accommodates users who run the CCLTRGEN routines. For loans other than direct loans, the system populates all fields except for LN_APPL_ID. As a result, the system only creates one VAR_DATA_LOAN record when the loan origination process is run along with the CCLTRGEN routine.

Selection Criteria

Select the institution, aid year, and academic career for which to create a promissory note communication record for loans originated for that group of students.

Ln Output Type (loan output type) Select a value to set the output format for your documents from *Delimited*, *External*, *Fixed*, and *Positional*. For direct lending, PeopleSoft supports *External* (for institutions that use third-party software to generate documents) and *Positional* values.

Report Package Specify your report package based on how you set up the Loan Report Packages page. The system evaluates the report package and assigns communications to any loan types the student may have that correspond to the document types defined in the package.

Document Type

Select from:

Hlth Pnote

Mstr Pnote: The system generates communications only for Subsidized Stafford or Unsubsidized Stafford loan types.

PNote: The system generates communications for PLUS and Graduate PLUS loans.

Perk PNote

Univ Pnote

All document types are linked to the loan category and loan program from the Loan Type Table.

If you leave this field blank, the system assigns communications to any loan types that the student has that correspond to the document types defined in the report package. If you enter a value, the system assigns communications only to the loan type that matches the selected document type. For example, if *Pnote* is selected, the system generates communications only for PLUS loans.

Note. Although *Cover Ltr*, *TIL*, and *TIS* are listed, they are not valid selections for Document Type for this process.

Print Option

Select which promissory notes to print. Values are:

Blank: This option prints promissory notes for all loan types that have not had a promissory note printed.

New: This option is similar to the *Blank* option processing promissory notes for all loan types, except when processing direct lending subsidized and unsubsidized loans. The *New* option only creates a master promissory note communication for students who do not have an accepted loan origination in a previous year and who do not have a MPN on file with the COD.

P Stat: This option prints all promissory notes that the COD origination acknowledgment file has flagged to print.

From Date and Thru Date

Select a range of dates. The system generates communications for loans with origination dates that start with the from date and end with the thru date.

Student Override

Select this check box to allow you to print a promissory note for specific students. If an existing promissory note is lost, use this method to create new communications.

ID

Select an ID for the students requiring their promissory note to be printed. Add a new row for each student for whom you want to create a promissory note communication.

Note. After you run the Create DL PNote Comm process once with the document type blank, you can create additional promissory notes and promissory note communications by running the process using singular document types or using the from and thru dates. Otherwise, the communication continues to select all the promissory note types and populating the promissory note communication table with multiple rows.

Check the Batch Message Inquiry page in this component after you run the process to be sure it completed correctly.

See Also

Using PeopleSoft Enterprise Applications PeopleBook

Printing Direct Loan Master Promissory Notes

Access the Print DL Promissory Note page (Financial Aid, Loans, Print Promissory Note, Print DL Promissory Note).

Print DL Promissory Note

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria Find | View All First 1 of 1 Last

'Institution: PSUNV Ln Output Type: Positional
'Aid Year: 2009 Report Package: POSITIONAL
'Career: UGRD Document Type: P Note Number of Copies: 2

☒ Student Override

ID	Name
FAD0125	Lai, Jessica E

Print DL Promissory Note page

Use this page to run the Print Packages/PNote Docs process (FALDPNT2).

You can use Master Promissory Notes (MPN) in making Subsidized and Unsubsidized Stafford, PLUS, and Graduate PLUS loans in the Direct Loan (DL) program. One promissory note can be used to make one or more loans to a parent borrower to help pay for the educational costs of one dependent student for one or more academic years.

If your institution collects signed promissory notes for the Direct Lending program, you can produce a manifest to send with the signed promissory notes to the Direct Lending common origination and disbursement processing center (COD).

A loan origination record must exist before you can create a promissory note. Set up your Manage Communication Tables in Campus Community, set up Loan Report Packages and DL Serial Pnote Tables in Process Loans. To print a promissory note, first create a promissory note communication record for the types of documents defined in the report package selected. The print process that produces the output for the promissory notes reads the communication record.

Campus Solutions uses an unlabeled format for printing promissory notes and only supports a positional print process. There is also an extract process.

Note. For details on how to set up a loan origination record, the Manage Communication Table, Loan Report Packages, and DL Serial Pnote Tables:

See [Chapter 37, "Processing Direct Loans," Creating and Using Promissory Notes, page 1428.](#)

Selection Criteria

The following fields are the same as those on the Create DL PNote Comm page: Institution, Aid Year, Career, Ln Output Type, Student Override, and ID.

Ln Output Type (loan output type)	Select <i>Positional</i> . For Subsidized and Unsubsidized Stafford promissory notes, the system prints for unlabeled forms. For PLUS promissory notes, the system prints for labeled forms.
Report Package	Select <i>Positional</i> .
Document Type	<p>If you leave this field blank, the system generates output for each type of document defined in the report package that has an unprocessed communication record. If a cover letter or truth-in-lending document(s) is defined in the package they are also produced.</p> <p>If you enter a value, the system generates output only for the document type selected (where an unprocessed communication record exists).</p> <p>If you select <i>Mstr Pnote</i>, the system generates output only for Subsidized and Unsubsidized Stafford Promissory Notes. If you select <i>Pnote</i>, the system generates output only for PLUS Promissory Notes.</p>
From Date and Thru Date	<p>Select the range of dates for the promissory note/package print process. The system processes communication records with dates that start with the date you enter in the From Date field and end with the date you enter in the Thru Date field.</p> <p>If you select the Student Override check box, the date fields do not appear.</p>
Number of Copies	Enter the number of promissory notes to print.

Note. The system manages positional printing differently. When you run the process to create the communication record, the system processes all loan types associated with the package. It creates all of the communication records. If you are using positional printing, you can only print one document at a time. When you select the package you want to use, you must also specify which document type you want to run.

See Also

Using PeopleSoft Enterprise Applications PeopleBook

Signing and Reviewing Direct Loan Promissory Notes

Access the Direct Loan PNote page (Financial Aid, Loans, Direct Lending Management, Review Promissory Note Actions, Direct Loan PNote).

Direct Loan PNote

ID: FAD0125 Lai,Jessica E

DL Pnote ID: 539900728M04G01315001

☐ Borrower Signature

☐ Student Signature

Signature Date: 05/09/2005

Signature Date:

Manifest: Batch

Loan Manifest Date: 05/09/2005

Loan PNOTE Type: MPN

Loan Pnote Status: Accepted

Promissory Note Amount:

Actions
Details
CRC Lender Information

Sequence	Description	Loan Pnote Status	Loan Action Status Dt
2	Accepted	Accepted	05/09/2005
1	Created	Pending	05/09/2005

Direct Loan PNote page: Actions tab

Note. Select the tabs on the page to access multiple views of this page. Fields common to all views are documented first.

Common Page Information

DL Pnote ID	Beginning with 2003-2004, direct loan application processing supports master promissory note requirements for the PLUS loan types. The system adds the letter N to the ID to indicate that the loan is PLUS Loan MPN. The system adds the letter M to indicate that the loan is a Stafford (subsidized or unsubsidized) Loan MPN.
Loan PNOTE Type (loan promissory note type)	Displays the type of promissory note used for this loan.
Loan PNote Status (loan promissory note status)	Displays the current status of the loan promissory note. This is the same as the Loan Pnote Status field on the Actions tab.
Promissory Note Amount	Displays the amount of the promissory note.
Borrower Signature	Select this check box when the borrower has signed the promissory note. For a PLUS loan, the borrower is the parent or guardian. The system makes the Student Signature field unavailable.

Note. The Checklist associated with the loan type is inserted when the Promissory note Communication is assigned. In previous versions of Financial Aid, the Checklist associated with the loan was inserted at loan origination. Make sure you have assigned a 3Cs inquiry group to your communication category.

Student Signature	Select this check box when the student has signed the promissory note. The student signature is unavailable on the promissory note for PLUS loans only.
--------------------------	---

Signature Date Displays today's date. You can edit the field if needed.

Manifest Select the status of this promissory note in regards to the Loan Manifest. Use this check box when your institution collects signed promissory notes and sends them with a manifest to a loan service provider or the direct lending common origination and disbursement processing center (COD). The values are:

Authorize: Indicates that the signature check boxes are selected.

Batch: Indicates that the Manifest Generation process is complete.

Pending: Indicates that the loan is originated.

Actions Tab

Sequence Displays the promissory note action sequence generated from the loan record activity. When multiple sequences exist for a promissory note, they display in reverse chronological order.

Description Displays a description for the displayed action code.

Loan Pnote Status (loan promissory note status) Displays the current status of the promissory note. Values are *Accepted*, *Pending*, and *Rejected*.

Loan Action Status Dt (loan action status date) Indicates the date when the loan action status activity occurred.

Details Tab

Select the Details tab.

Direct Loan PNote

ID: FAD0125 Lai, Jessica E
DL Pnote ID: 539900728M04G01315001

Loan PNOTE Type: MPN **Loan Pnote Status:** Accepted **Promissory Note Amount:**

☒ **Borrower Signature** **Signature Date:** 05/09/2005 **Manifest:** Batch

☐ **Student Signature** **Signature Date:** **Loan Manifest Date:** 05/09/2005

Actions

Details

CRC Lender Information

Borrower Signature	Signature Date	Student Signature	Signature Date	Promissory Note Amount
<input checked="" type="checkbox"/>	05/09/2005	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	05/09/2005	<input type="checkbox"/>		

Direct Loan PNote page: Details tab

Borrower Signature Indicates whether the borrower has signed the promissory note.

DL Batch Signature page

Use this page to sort based on aid year by selecting it on the Selection Criteria page.

Note. This page is designed to select a cumulative list of outstanding unsigned promissory notes. To select the promissory notes to be signed, review the aid year designation in the DL Pnote ID. The two-digit aid year designation is located after the Borrower's Social Security Number and the *M* for a Stafford loan and the *P* for a PLUS.

Description	Enter a description for the current batch of signatures that you are creating.
Batch Pnote Action (batch promissory note action)	Choose the <i>Select</i> option to specify the promissory notes to sign.
Batch PNote Selection (batch promissory note selection)	Click this link to access the Loan Pnote Selection Criteria page, where you can specify which promissory notes to sign. Click the lightening bolt to activate the selection.

The group box contains the promissory note ID numbers and names of the students you selected.

DL PNote ID (direct lending promissory note ID)	Select the unique ID assigned to the promissory note.
Name	Displays the borrower name that is on the promissory note.
PNote Status	Displays the current status of the promissory note. Values are <i>Accepted</i> , <i>Pending</i> , and <i>Rejected</i> .
PNote Type	Specifies the type of promissory note. It displays either <i>MPN</i> for Stafford loans or <i>PNOTE</i> for PLUS loans.
Borrower Signature	Select this check box to indicate that the borrower signed the promissory note. The system automatically selects this check box when you sign a batch of promissory notes. Clearing the check box indicates that the borrower has not signed the promissory note. Use the date field to enter the date that the borrower signed the promissory note.

Student Signature This check box is active for PLUS PNOTE types only.

The field that displays to the right of the student signature date field contains the status of the manifest. When you sign the promissory note, the status changes to *Authorize*. Prior to signing the promissory notes, the status is *Pending*. After the manifest generation process is complete, the status is *Batch*.

Signing or Unsigning a Group of Promissory Notes

To sign the entire group of promissory notes:

1. Select the *Sign* option in the Batch PNote Action field.
2. Click the lightening bolt to select all the active signature check boxes. For PLUS notes, both the Borrower Signature and Student Signature check boxes are active.

To unsign the entire group of promissory notes:

1. Select the *Unsign* option in the Batch PNote Action field.
2. Click the lightening bolt to clear all the active signature check boxes.

The group box contains the promissory note ID numbers and names of the students you selected.

Entering Loan Pnote Selection Criteria

Access the Loan PNote Selection Criteria page (click the Batch PNote Selection button from the DL Batch Signature page).

Loan Pnote Selection Criteria

Batch Pnote ID: BJF

Aid Year: 2008

Last Name FROM:

Last Name TO:

National ID FROM:

National ID TO:

Loan PNOTE Type: Both

OK **Cancel**

Loan Pnote Selection Criteria page

You can select promissory notes by the borrower's name or National ID number. For U.S. citizens this is the social security number. You can also specify whether to select promissory notes of a specific type.

Aid Year Select the aid year on which to sort the signature records.

Last Name FROM and Last Name TO	Use these fields to select a group of students by their last names. Enter the beginning name for the range in the FROM field and the ending name in the TO field.
National ID FROM and National ID TO	Use these fields to select a group of students by their national ID numbers. Enter the beginning national ID number for the range in the FROM field and the ending national ID in the TO field.
Loan PNOTE Type	Select the type of promissory note to sign. Select <i>MPN</i> for Stafford loans or <i>PNOTE</i> for PLUS loans. To include both types of promissory notes, select <i>Both</i> .

Viewing Promissory Note Action History and Loan Disbursement Messages

This section discusses how to:


- View promissory note action history.
- View loan disbursement messages.

Page Used to View Promissory Note Action History and Loan Disbursement Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Loan PNote Action	LN_DL_PNOTE_INQ	Financial Aid, Loans, Direct Lending Management, View Promissory Note Actions, Direct Loan PNote Action	View promissory note action history. This is information the same information as on the Direct Loan PNote page, but this page cannot be updated. You can also review messages pertaining to rejected transactions.

Viewing Promissory Note Action History

Access the Direct Loan PNote Action page (Financial Aid, Loans, Direct Lending Management, View Promissory Note Actions, Direct Loan PNote Action).

Direct Loan PNote Action			
  			
ID:	FAIV0053 Latch,Evan H		
DL Pnote ID:	606494453N08G01315001		
Loan PNOTE Type: PNOTE		Loan Pnote Status: Accepted	Promissory Note Amount:
<input checked="" type="checkbox"/> Borrower Signature	Signature Date: 09/13/2007	Manifest: Authorize	
<input checked="" type="checkbox"/> Student Signature	Signature Date: 09/13/2007	Loan Manifest Date:	
<div> <div>Actions</div> <div>Details</div> <div>CRC Lender Information</div> </div>			
Sequence	Description	Loan Pnote Status	Loan Action Status Dt
2	Created	Pending	09/13/2007
1		Accepted	09/13/2007

Direct Loan PNote Action page

Actions Tab

Click the Msg (message) link to access the Loan Disbursement Messages page, where you can view messages that explain the problem with the promissory note.

See Also

Chapter 37, "Processing Direct Loans," Signing and Reviewing Direct Loan Promissory Notes, page 1434

Viewing Loan Disbursement Messages

Access the Loan Disbursement Messages page (click the Msg link on the Direct Loan PNote Action page).

Loan Disbursement Messages			
Promissory Note Action			
Sequence:	2	06/29/01 3:20:31PM	
Batch ID:	#A2G0131520010629111855		
PNT MsqSq	Msg Code	Msg	Descr
1	01	Msg	Missing Origination Record

Loan Disbursement Messages page

PNT MsqSq (promissory note message sequence) Displays the number generated from the promissory note record activity. Multiple sequences display , with the most recent sequence first.

Msg Code (message code) Displays the code that the COD has assigned to this action message.

Msg (message)	Click this link to view the full text of the message.
Descr (description)	Displays the description of the action message.

Processing Direct Loan Manifests

If your institution collects signed promissory notes for the direct lending program, you must produce a manifest to send with the signed promissory notes to the direct lending common origination and disbursement (COD) processing center. When you receive a signed promissory note, access the Direct Loan Pnote page and indicate that the promissory note is signed. The system sets the Manifest Status to *Authorize* and the promissory note is included the next time you create a loan manifest.

Next, create the data for the loan manifest by running the Populate Manifest process, which selects all students' promissory notes that have a manifest status of *Authorize*. You can review the selected promissory notes and delete any not to be included in the manifest before printing the manifest.

Then manually sort the signed promissory notes and attach the printed manifest to each group of fifty promissory notes. Financial Aid creates a manifest for every fifty promissory notes. Separate manifests are created for Stafford subsidized and unsubsidized and PLUS promissory notes as required by the COD.

This section discusses how to:

- Create a direct loan manifest.
- Edit a direct loan manifest.
- Print PLUS and Stafford loan manifests.

Pages Used to Process Direct Loan Manifests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Populate Manifest	RUNCTL_MANIFEST1	Financial Aid, File Management, Direct Loans, Generate Direct Loans Manifest, Populate Manifest	Select the students whose promissory notes are signed and ready to be added to the loan manifest.
Direct Loan Manifest	LOAN_MANIFEST	Financial Aid, Loans, Direct Lending Management, Review Manifest Batches, Direct Loan Manifest	View the list of students and their loan IDs that are in each manifest. There are separate manifests for Stafford and PLUS promissory notes. You can remove students that should not be included on the manifest.

Page Name	Definition Name	Navigation	Usage
DL Print PLUS Manifest	RUNCTL_MANIFEST2	Financial Aid, Loans, Direct Lending Management, Print Manifest Report PLUS, DL Print PLUS Manifest	Print PLUS loan manifests.
DL Print Stafford Manifest	RUNCTL_MANIFEST3	Financial Aid, Loans, Direct Lending Management, Print Manifest Report— Stafford, DL Print Stafford Manifest	Print subsidized and unsubsidized Stafford loan manifests.

Creating a Direct Loan Manifest

Access the Populate Manifest page (Financial Aid, File Management, Direct Loans, Generate Direct Loans Manifest, Populate Manifest).

Populate Manifest

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Academic Institution: PeopleSoft University
Aid Year: Financial Aid Year 2008 - 2009

Populate Manifest page

Use this page to run the DL Manifest Generation process for subsidized and unsubsidized loans (FAMANF01). The DL Manifest Generation process for PLUS loans is FAMAN2.

Select the academic institution and aid year of the promissory notes to be included on the manifest.

Editing a Direct Loan Manifest

Access the Direct Loan Manifest page (Financial Aid, Loans, Direct Lending Management, Review Manifest Batches, Direct Loan Manifest).

Direct Loan Manifest

Institution: PSUNV **Aid Year:** 2005 **School Code:** 001315 **Loan Manifest Date:** 09/27/2004

Find First 1 of 2 Last

Manifest Group Number: 1 **DL Batch ID:** #A500131520040927143408

Seq Number	ID	Loan ID		Delete Row
1	FAD0125	539900728S05G01315001	MPN	<input type="checkbox"/>

Direct Loan Manifest page

School Code	Displays the Central Processing Center (CPS) code for your institution.
Loan Manifest Date	Displays the date you created the manifest.
Manifest Group Number	Indicates each manifest group. A new manifest group is created for each Stafford or PLUS group of fifty promissory notes. You can view the different manifest groups.
DL Batch ID (direct lending batch identifier)	Displays a batch ID comprised of alphanumeric characters representing batch type, cycle year, school code, date, and time. This batch ID is used to monitor and control the number of promissory notes accepted by the Department of Education COD.
Seq Number (sequence number)	Indicates the order that you should organize the signed promissory notes you include with the manifest.
ID	Displays the student's ID.
Loan ID	Displays the identification number of the loan. The promissory note type is displayed next to this field.
Delete Row	Select this check box to remove a student from the manifest when it is printed. To include the student in future manifests, reset the manifest status to <i>Authorize</i> on the Direct Loan PNote page.

Printing PLUS and Stafford Loan Manifests

Different run control pages are available for printing PLUS loan manifests and Stafford loan manifests. Use the Plus Manifest page to print PLUS loan manifests and the Stafford Manifest page to print Stafford loan manifests that you have created. You can print or reprint the manifests by date or by manifest group.


Printing a PLUS Loan Manifest

Access the DL Print PLUS Manifest page (Financial Aid, Loans, Direct Lending Management, Print Manifest Report PLUS, DL Print PLUS Manifest).

DL Print PLUS Manifest

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)


Academic Institution:

PSUNV 

Aid Year:

2009 


Loan Manifest Date:



From Manifest Group Number:



Thru Manifest Group Number:



DL Print PLUS Manifest page

Use this page to run the Generate Manifest Report process for subsidized and unsubsidized (FAMANFS3). The process that runs the DL Manifest Generation for PLUS loans is FAMANFS2.

Loan Manifest Date	Select the manifests to print by entering a loan manifest date. If you enter a value in this field, the From Manifest Group Number and Thru Manifest Group Number fields are not available.
From Manifest Group Number	Select a group of manifests to print, from this manifest group number through the group number in the Thru Manifest Group Number field. The system prints the most current instance of each manifest for that date selected. All loan manifest groups are available, even if they have been printed.
Thru Manifest Group Number	Enter the ending manifest group number to specify the manifests to print.

Printing a Stafford Loan Manifest

Access the DL Print Stafford Manifest page (Financial Aid, Loans, Direct Lending Management, Print Manifest Report— Stafford, DL Print Stafford Manifest).

DL Print Stafford Manifest

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Academic Institution:

PSUNV

Aid Year:

2009

Loan Manifest Date:

From Manifest Group Number:

Thru Manifest Group Number:

DL Print Stafford Manifest page

Use this page to run the Print Manifest Report Stafford process (FAMANFS3).

Using EC Queue Status with Direct Loan Processing

This section discusses how to review the EC Queue status.

Page Used to Review the EC Queue Status

Page Name	Definition Name	Navigation	Usage
EC Queue Review (electronic commerce queue review)	FA_LN_EDI_ECQUEUE	Financial Aid, File Management, CommonLine Loans, Review CL 4 File Transactions, EC Queue Review	Review and edit the EC Queue Status for a file in the staging tables. FA_LN_EDI_ECQUEUE

Reviewing the EC Queue Status

Access the EC Queue Review page (Financial Aid, File Management, CommonLine Loans, Review CL 4 File Transactions, EC Queue Review).

EC Queue Review						
Loan EC Queue Records				Customize	Find	View All
File Status Information				Bus Unit/Cust/Vndr Info		
In/Out	Trans ID	Queue Inst	EC Queue Status	Update Status	EC Driver Datetime	EC Queue Control Number
O	A004P	1	Processed	Update Status		4P072004501
O	A004P	2	Processed	Update Status		4P072204501
O	A004P	3	Processed	Update Status		4P081604401

EC Queue Review page

Click the Update Status button to change the EC Queue Status field. The Override button toggles through the following values: *P- processed*, *E- error*, and *L- loaded*.

The EC Queue Status indicates the load status for the entire file. A file can contain one or many records. When the flat file is loaded into the EDI Manager staging tables, the EC Queue Status is set to *Loaded*. When the data in the file is moved from the staging tables to the database, the EC Queue Status is set to *Processed*. To prevent a specific file from being loaded to the database, set the EC Queue Status to *Processed* and the system ignores the file on subsequent loads to the database.

To reload a file to the database, set the EC Queue Status to *Loaded*.

A file with an EC Queue Status of *Error* is automatically recycled attempted to be loaded to the database the next time the inbound process is run.

Viewing Direct Loan EC History

You can access Direct Loan EC history for aid years that were removed from the menu; it retrieves Direct Loan data from 2004 and earlier.

This section discusses how to enter data to review DL EC history.

Pages Used to View Direct Loan EC History

Page Name	Definition Name	Navigation	Usage
Direct Loan EC History Information	DL_EC_HIST_TRNSFR	Financial Aid, Financial Aid History, View Archived Direct Loan Data, Direct Loan EC History Information	Access Direct Loan History.


Page Name	Definition Name	Navigation	Usage
Batch Header	DL_HDR_ORIG_01	Click the Originations link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Origination Export component for aid year 2001: Batch Header, Borrower Export Information, Student Export Information, Financial Export Information, and Batch Trailer.
Batch Header	DL_HDR_ORGACK_01	Click the Originations Acknowledgements link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Origination Acknowledgment Import component for aid year 2001: Batch Header, Origination Acknowledgement, and Batch Trailer.
Batch Header	DL_HDR_CHG_01	Click the Changes link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Change Export component for aid year 2001: Batch Header, Change Information, and Trailer.
Batch Header	DL_HDR_CHGACK_01	Click the Change Acknowledgements link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Change Acknowledgment component for aid year 2001: Batch Header, Change Acknowledgement, and Batch Trailer.
Batch Header	DL_HDR_CRD_01	Click the Credit Decisions link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Credit Import 00/01 component for aid year 2001: Batch Header, Credit Decision, and Batch Trailer.
Batch Header	DL_HDR_PNT_01	Click the PNote Acknowledgements link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Promissory Note Import component for aid year 2001: Batch Header, Pnote Acknowledgement, and Batch Trailer.


Page Name	Definition Name	Navigation	Usage
Batch Header	DL_HDR_DSB_01	Click the Disbursements link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Disbursement Export component for aid year 2001: Batch Header, Disbursement Information, and Batch Trailer.
Batch Header	DL_HDR_DSBACK_01	Click the Disbursement Acknowledgements link on the Direct Loan EC History Information page.	View data on the following pages in the Direct Loan Disbursement Acknowledgement Import component for aid year 2001: Batch Header, Disbursement Acknowledgement, and Batch Header.

Entering Data to Review DL EC History

Access the Direct Loan EC History Information page (Financial Aid, Financial Aid History, View Archived Direct Loan Data, Direct Loan EC History Information).

Direct Loan EC History Information

ID: 

Aid Year: 

[Originations](#)
[Origination Acknowledgements](#)

[Changes](#)
[Change Acknowledgements](#)

[Credit Decisions](#)
[PNote Acknowledgements](#)

[Disbursements](#)
[Disbursement Acknowledgements](#)

Direct Loan EC History Information page

ID	Enter the student's ID.
Aid Year	Enter an aid year of 2004 or earlier.
Originations	Click to access the Direct Loan Origination Export component.
Origination Acknowledgements	Click to access the Direct Loan Origination Acknowledgement Import component.

Changes	Click to access the Direct Loan Change Export component.
Change Acknowledgements	Click to access the Direct Loan Change Acknowledgement component.
Credit Decisions	Click to access the Direct Loan Credit Import component.
Pnote Acknowledgements	Click to access the Direct Loan Promissory Note Import component.
Disbursements	Click to access the Direct Loan Disbursement Export component.
Disbursement Acknowledgements	Click to access the Direct Loan Disbursement Acknowledgement Import component.

Processing Direct Lending Origination Changes

This section discusses how to process Direct Lending origination changes.

Page Used to Process Direct Lending Origination Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
DL Student Change Information	LN_DL_EMPL_PARM	Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change, DL Student Change Information	Set change parameters for a particular student. By setting change parameters for specific fields, you can determine how Direct Lending change processing handles the specified fields for the particular student.

Setting Change Parameters for Direct Loan Origination Changes

Access the DL Student Change Information page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change, DL Student Change Information).

DL Student Change Information				
ID: FAD0147	Hutt, Peter R	Institution:	PSUNV	Aid Year: 2009
DL Student Change Parameters				
Find View All First 1-2 of 2 Last				
*Chg Field#:	Description:	DL Change Type:	*Change Parm:	
P002	Student SSN	Demographic	No Chg	+ -
S005	Borrower Social Security Nbr	Demographic	Suspend	+ -

DL Student Change Information page

Specify any change processing requirements for the selected student by entering the fields in the DL Student Change Parameters group box. The fields are the same fields as on the Ln DI Inst Parm page.

Note. The above change parameters affect those loans that have been transmitted to the COD. Prior to submitting loans to the COD, you can change the fields on the loan record without generating a change transaction. Change transactions occur when you make changes to loans you have transmitted to the COD.

Understanding Direct Lending Change Processing

This section discusses three examples of the Direct Loan Origination Change process. Each example addresses a different type of change. The processing examples are:

- A bio/demo change.
- An award change.
- A rejected origination change.

Processing a Bio/Demo Change

The following steps represent the process for changing bio/demo data. For this example, the borrower's date of birth requires a change after you have originated the loan and transmitted it to the COD.

To change bio/demo data:

1. Enter and save a new date in the Birth date field on the Bio/Demo Data page (SA_BIO_DEMO_DATA3).

2. For the Loan Change process to recognize the changed field, you can flag the loan for change processing. Click the Activate Change button on the Application Acknowledgment page (LOAN_ORIG_STAT_DL0) (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Acknowledgment).

Note. Click the Activate Change button to trigger the Loan Adjustment process to review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Change process here. Click the Activate Change button for any other data changes (for example, the student or borrower name) to start the Loan Change process.

3. Initiate the Loan Change process by running the Loan Origination process. Access the Loan Origination page (Financial Aid, Loans, Process Loans, Loan Origination, select the Adjustments check box, and run the Loan Origination process.
4. Review the Application Acknowledgment page. At this point, the Loan Process Status is *In Service* and the Loan Orig Trans Stat (loan origination transaction status) is *Change Pending*.
5. Review the Direct Loan Orig Actions page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions) to ensure that the change was processed. The latest sequence number should reflect an *Origination Change*, with an action status of *Pending*.
6. The change is complete and ready to send to the COD.

Processing an Award Change

The following steps represent the process for changing an award. For this example, you are canceling the borrower's unsubsidized loan after the loan was originated, transmitted, and acknowledged by the COD.

To process an award change:

1. Make the change to the award on the Student Aid Package page (STDNT_AWARD_ENTRY3). If you canceled the Unsubsidized loan, for example, the offered and accepted amounts are now zero.
2. Initiate the Loan Change process by running the Loan Origination process with the Adjustments check box selected.
3. Review the Application Acknowledgment page to verify the Loan Change process completed successfully. See Step 4 under Processing a Bio/Demo Change. At this point, the Loan Process Status is *In Service* and the Loan Orig Trans Stat (loan origination transaction status) is *Change Pending*.
4. Review the Direct Loan Orig Actions page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions) to ensure the change was processed. The latest sequence number should reflect an *Origination Change*, with an action status of *Pending*.
5. At this point, the change is complete and you would create the Direct Loan Change Processing outbound file to send to the COD. View this file using the Direct Loan Change Export nn/nn component. The COD must acknowledge the change by sending a Direct Loan Change Acknowledgement file.

Processing a Rejected Origination Change

The following steps represent the process when a change is sent to the COD and the COD rejects the change. In this example, you attempt to change the citizenship status of a student.

To process a rejected origination change:

1. Change the value of the Citizenship Status field on the Citizenship Detail page from the Bio/Demo Data page (SA_BIO_DEMO_DATA3).
2. For the Loan Change process to recognize the changed field, flag the loan for change processing. Click the Activate Change button on the Application Acknowledgement page (Financial Aid, Loans, Direct Lending Management, Manage Direct Loan Application, Application Acknowledgment).

Note. Click the Activate Change button to trigger the Loan Adjustment process to review the student for change transactions. Data changes in the Direct Loan Application component or the Award Entry page do not require you to manually start the Loan Change process here. Click the Activate Change button for any other data changes (for example, the student or borrower name) to start the Loan Change process.

3. Initiate the Loan Change process by running the Loan Origination process with the Adjustments check box selected. Access the Loan Origination page (Financial Aid, Loans, Process Loans, Loan Origination). Select the Adjustments check box and run the Loan Origination process.
4. Review the Application Acknowledgment page to verify that the Loan Change process completed successfully. See Step 4 under Processing a Bio/Demo Change. At this point, the Loan Process Status is *In Service* and the Loan Orig Trans Stat (loan origination transaction status) is *Change Pending*.
5. Review the Direct Loan Orig Actions page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions) to ensure the change was processed. The latest sequence number should reflect an *Origination Change*, with an action status of *Pending*.
6. Run the Origination Change Outbound and Outbound EC Agent (EDI outbound) processes to export the file to the COD.
7. The COD returns the acknowledgement file that includes the error code.
8. Run the COD Inbound processes to import the COD data.
9. Review the Exception Error, the DL Inbound Origination Acknowledgement Errors, and the DL Rejected Origination Changes reports to determine which records contain errors.
10. Review the Application Acknowledgment page to view the inbound file you determined has an error. See Step 4 under Processing a Bio/Demo Change.
11. Review the Direct Loan Orig Actions page (LN_DL_ORIG_INQ) to see details about the error. The latest sequence shows an origination change with an action status of *Rejected*.
12. Fix the error and resubmit the change record to the COD.

Managing Direct Lending Cash Transactions

This section provides an overview of direct lending cash management and discusses how to manage Direct Lending cash transactions

Understanding Direct Lending Cash Management

Managing your Direct Lending cash transactions entails entering information for cash receipts, cash draw-downs, and return of excess cash, and then reconciling that information with similar information from the COD. You also reconcile individual student disbursements using the data in your Loan Application tables and the disbursement information from the COD. Reconciliation ensures on a monthly basis that your institution reviews and compares its Direct Lending origination and disbursements to student accounts against the cash balance reported by the COD.

For each reconciliation period, a comparison is made among Financial Aid, PeopleSoft Enterprise Student Financials, and COD data. Data from all three sources should match. The Student Financials data shows dollars actually disbursed to students and the amount of each cash receipt and return of excess cash.

Your institution receives cash receipts from Grants Administration and Payment System (GAPS) and returns excess cash to GAPS. Usually, the Bursar's Office interacts directly with GAPS to request funds for Direct Loan disbursements to students. Work with your Bursar's Office or other appropriate office when using the Cash Reconciliation pages.

Understanding the Direct Loan School Account Statement

The COD sends the Direct Loan School Account Statement (DLSAS) to schools that participate in the Direct Lending program. The *Direct Lending Technical Reference* states that schools must reconcile the school's Direct Loan records on file at the COD with the school's internal Direct Lending records. This School Reconciliation process should be performed on a monthly basis.

For more details, see the *Direct Loan School Guide*. Each school is responsible for reviewing the monthly statement to ensure the accuracy of the data. This data must also be reconciled to the school's internal student account records and bank records.

Managing Direct Lending Cash Transactions

The general steps used in the Direct Lending Cash Management process are:

1. Set up your Cash Transaction page for the aid year.
2. Receive cash receipts cash drawdowns and return excess cash.
3. Enter your cash receipt and return of excess cash information on the Cash Transaction page.
4. Enter your cash receipt and return of excess cash information on the Cash Detail page.
5. Use the online and report information to reconcile your institutional data with the COD data.
6. Repeat Steps 2 - 5 for each Reconciliation Period.

Entering Cash Summary Data

Before you receive the SAS file, you can manually enter cash transactions, including information about your cash receipts from GAP) and your excess cash returned to GAPS. The DL-SAS reports use the data you enter manually to compare and match reported fund levels from the DL-SAS file.

This section discusses how to enter institutional data for cash transactions.

Note. This page is used for the DLSAS processing.

Page Used to Enter Cash Summary Data

Page Name	Definition Name	Navigation	Usage
Direct Loan Cash Transactions	LN_DL_CASH_DTL	Financial Aid, Loans, DL School Account Summary, Manage DL Cash Transactions, Direct Loan Cash Transactions	Enter your institutional data for cash transactions, including information about your cash receipts from GAPS and your excess cash returned to GAPS.

Entering Institutional Data for Cash Transactions

Access the Direct Loan Cash Transactions page (Financial Aid, Loans, DL School Account Summary, Manage DL Cash Transactions, Direct Loan Cash Transactions).

Direct Loan Cash Transactions						
Institution: PSUNV		Aid Year: 2009		School Code: 001315		
*Transaction Date	*Transaction Type	Check Number	*Transaction Amount	GAPS Control Number		
1 <input type="text"/> 31	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Direct Loan Cash Transactions page

To report your cash transactions, set up the Direct Loans Cash Transactions page for the new aid year.

Transaction Date Enter the date on which the cash transaction occurred at your institution.

Transaction Type Select the cash transaction that you are entering:
Cash Receipt: Your institution receives a cash draw down.
Return of Excess Cash: Your institution returns excess cash.

Check Number Enter the number of the check sent to the U.S. Department of Education for returned funds. This information typically comes from your Bursar's Office. This field is only used with cash return transactions. You or the Bursar Office can enter the data in this field.

Transaction Amount Enter the total amount of funds received from GAPS or returned to GAPS for this transaction. This information typically comes from your Bursar's Office. You or the Bursar Office can enter the data in this field.

GAPS Control Number (Grants Administration and Payment System control number) Enter the GAPS Control Number received from GAPS. This information typically comes from your Bursar's Office. You or the Bursar Office can enter the data in this field.

Using Loan/Import Programs

Beginning with processing year 2003-2004, you use the FA Inbound page to import the SAS file types (DSDFnnOP and/or DSLFnnOP, where nn is the processing year). The FA_INBOUND Application Engine process loads the data into staging tables.

This section discusses how to load the SAS file.

Page Used to Load the SAS File

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FA Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load external financial aid electronic commerce files.

Loading the SAS File

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files, FA Inbound).

FA Inbound

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

Run Option:
☒ Single File
☐ File List

Inbound File: C:\FLATDATA\DL\SAS\DSDF04OP_005.DAT

FA Inbound page

Use the Inbound File field to set the location and name of the file to be loaded. Make sure that your application server has access to the location of the file.

Note. The FA_INBOUND process automatically determines the file type by reading the header row of the file. It is important that the file be in its original, unaltered state. Opening the file with a text editor that automatically reformats the file—such as trimming blank spaces at the end of each row of data in the file—may cause the load to fail.

Viewing Data Import Information

This section discusses how the fields in the Direct Loan Cash Sum Imp nn/nn component map to the fields in the SAS file types. It discusses how to:

- View header information.
- View cash summary information.
- View disbursement summary information.
- View cash detail information.
- View loan level detail information.
- View disbursement activity information.
- View trailer information.


Pages Used to View Data Import Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Header	DL_HDR_DLSAS_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Batch Header	View header information from the SAS file.
Cash Summary	DL_DLSAS_CSHSUM_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 2006-2007, Cash Summary	View cash summary information from Sections I and II (Fixed Length)—Year-To-Date and Monthly Cash Summary (Record Type "T") of the SAS file.
Disbursement Summary	DL_DLSAS_DISSUM_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Disbursement Summary	View disbursement summary information from Sections III and IV (Fixed Length)—Year-To-Date and Monthly Disbursement Summary by Loan Type (Record Types "Y" and "M") of the SAS file.
Cash Detail	DL_DLSAS_CSHDTL_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Cash Detail	View cash detail information from Section V (Fixed Length)—Cash Detail (Record Type "C") of the SAS file.

Page Name	Definition Name	Navigation	Usage
Loan Level Detail	DL_DLSAS_LNLVL_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Loan Level Detail	View loan level detail information from Section VI (Fixed Length)—Loan Detail, Loan Level (Record Type "L") of the SAS file.
Disbursement Activity	DL_DLSAS_LNDAL_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Disbursement Activity	View disbursement activity information from Section VII (Fixed Length)—Loan Detail, Disbursement Activity Level (Record Type "D") of the SAS file.
Batch Trailer	DL_TRL_DLSAS_nn	Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Batch Trailer	View trailer information from the SAS file.

Viewing Header Information

Access the Batch Header page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Batch Header).

Batch Header	Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity	
<p>Batch ID: AS5G0131520040702165234 Status: Loaded</p> <p>Trans ID: DSLF050P Queue Inst: 1 In/Out: Inbound</p> <hr/> <p>Message Class: DSLF050P Record Length: 220 Process Instance: 257</p> <p>DL Create Date: 07/02/2004 User ID: PS</p> <p>DL Create Time: 165234</p>						

Batch Header page

Field	DLSAS Field
Batch ID	<p>Batch Identifier: The batch ID associated with the detail records is constructed as follows:</p> <p>Batch Type: #A-Z</p> <p>Cycle Indicator= 4 (for 03-04)</p> <p>School Code: X00000-X99999, where X = G or E</p> <p>Date Batch Created = CCYYMMDD</p> <p>Time Batch Created = HHMMSS</p>
Trans ID	<p>DL-SAS file type:</p> <ul style="list-style-type: none"> • DSDFnnOP = Disbursement Level • DSLFnnOP = Loan Level
Queue Inst	Queue instance number that identifies the particular instance of the inbound file you are viewing.
Status	<p>Load status. Values for the DL-SAS process are:</p> <ul style="list-style-type: none"> • Loaded – Data imported into the Inquire 2 Pages successfully. • Error – Problem with data import.
In/Out	Inbound is the only valid status for DL-SAS.
Message Class	<p>The Direct Loan Message Class table describes the message classes for sending and receiving Direct Loan data to and from the COD System.</p> <p>For the DL-SAS process the message classes are:</p> <ul style="list-style-type: none"> • DSDFnnOP (Fixed Length, Disbursement Level Loan Detail). • DSLFnnOP (Fixed Length, Loan Level Loan Detail).
DL Create Date	Created Date: The date when the record was created in the format CCYYMMDD.
DL Create Time	<p>Created Time: The time when the record was created; values range from 000000-235959.</p> <p>Format is HHMMSS, where</p> <p>HH = 00-23</p> <p>MM = 00-59</p> <p>SS = 00-59</p>
Record Length	Data Record Length. Indicates length of the data record: 0000-9999.
User ID	Source of information for the data.

Field	DLSAS Field
Process Instance	Business Process Instance Number used by the Business Document Summary to identify the inbound file.

Viewing Cash Summary Information

Access the Cash Summary page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Cash Summary).

Batch Header	Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity				
Batch ID: AS5G0131520040702165234		Status: Loaded							
Trans ID: DSLF050P		Queue Inst: 1		In/Out: Inbound					
School Code: G01315		Region Code: 09		State Code: CA					
Customize Find View All First 1-2 of 2 Last									
Booked Loan Info		Unbooked Loan Info							
Type	DL End Date	Beg Cash Bal	Cash Receipts	Excess Cash	Tot NetCsh Rpt	Net Book Disb	Net Book Adj	Tot Book Ln Dtl	End Cash Bal
Y1	06/30/2004		2910247		2910247	2016178	1479	2017657	892590
T1	06/30/2004	594532	306444		306444	10247	-1861	8386	892590

Cash Summary page

Field	DLSAS Field
School Code	School Code - Direct Loan School Code. Identifies the school originating the loan record. X00000-X99999 where X = G or E
Region Code	Region Code - 2-digit region code of the school. 01-99
State Code	State Code - 2-letter uppercase state code of the school. A valid two-letter postal code. See the State/Country/Jurisdiction Codes of the <i>COD Technical Reference</i> .
Booked Loan Info	
Type	Cash Summary Type <ul style="list-style-type: none"> Y1 = Year-To-Date Cash Summary Total T1 = Monthly Cash Summary Total

Field	DLSAS Field
DL End Date	<p>End Date - The date representing the end of the current statement period. This account statement represents activity up to and through this date only.</p> <p>Format is CCYYMMDD.</p> <p>19000101-20991231</p>
Beg Cash Bal	<p>Beginning Cash Balance is the COD beginning balance for this report.</p> <p>For Cash Summary Type = "Y1," this field is zero filled.</p> <p>For Cash Summary Type = "T1," this field represents last month's ending balance. It is all booked activity up to and through the prior month's end date.</p> <p>-9999999999 to 09999999999</p> <p>Zeros for Cash Summary Type = Y1</p>
Cash Receipts	<p>Cash Receipts - Total receipts of cash (draw downs) for the period.</p> <p>For Cash Summary Type = "Y1," this is the sum of all cash receipt (draw downs) transactions for the program year-to-date and corrections to draw downs processed during the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all cash receipts (draw downs) transactions for the current month and corrections to draw downs processed during current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled</p>
Excess Cash	<p>Excess Cash - Total excess cash returned for the period.</p> <p>For Cash Summary Type = "Y1," this is the sum of all excess cash transactions received by COD for the program year-to-date and corrections to excess cash processed during the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all excess cash transactions received by COD for the current month and corrections to excess cash processed during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Tot NetCsh Rcpt	<p>Total Net Cash Receipts - The difference between the total Cash Receipts (draw downs) and total Excess Cash returned.</p> <p>For Cash Summary Type = "Y1," this is the sum of all cash, -9999999999 to 09999999999. If no activity, zero filled receipts (draw downs) minus all excess cash returned to COD for the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all cash receipts (draw downs) minus all excess cash returned to COD for the current month.</p>

Field	DLSAS Field
Net Book Disb	<p>Net Booked Disbursements - The total net amount of all actual disbursements booked at COD.</p> <p>For Cash Summary Type = "Y1," this is the sum of all actual disbursements that were booked at COD during the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all actual disbursements that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Net Book Adj	<p>Net Booked Adjustments - The total net amount of all disbursement adjustments booked at COD.</p> <p>For Cash Summary Type = "Y1," this is the sum of all actual disbursement adjustments that were booked at COD during the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all actual disbursement adjustments that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p> <p>(-) indicates a downward adjustment.</p> <p>(+) indicates an upward adjustment.</p>
Tot Book Ln Dtl	<p>Total Booked Loan Detail - The total of Net Booked Disbursements and Net Booked Adjustments.</p> <p>For Cash Summary type = "Y1," this is the sum of all net disbursements and adjustments that were booked at COD during the program year-to-date.</p> <p>For Cash Summary Type = "T1," this is the sum of all net disbursements and adjustments that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
End Cash Bal	<p>Ending Cash Balance - This is COD's ending balance for this report.</p> <p>For Cash Summary Type = "Y1" and "T1," this is the ending cash balance at COD.</p> <p>-9999999999 to 09999999999</p>
Unbooked Loan Info	
<p>Note. The values on this tab are reported the same way for both "Y1" and "T1" cash summary types.</p>	

Field	DLSAS Field
Net Unbook Act	<p>Net Unbooked Disbursements Actual - The total net amount of all the actual disbursements not booked at COD. This is the sum of all unbooked actual net disbursements at COD as of the program year-to-date.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Net Unbk Adj	<p>Net Unbooked Adjustments - The total net amount of all the actual disbursement adjustments not booked at COD. This is the sum of all unbooked actual net disbursement adjustments at COD as of the program Year- To-Date</p> <p>.-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p> <p>(-) indicates a downward adjustment.</p> <p>(+) indicates an upward adjustment.</p>
Tot Unbk Ln Dtl	<p>Total Unbooked Loan Detail - The difference between the Net Unbooked Disbursement Actuals and the Net Unbooked Adjustments. This is the sum of all unbooked actual disbursement activities at COD as of the program year-to-date.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Adjusted Ending Cash Balance	<p>Adjusted Ending Cash Balance - The difference between the Ending Cash Balance and the Total Unbooked Loan Detail. This is the total year-to-date unbooked amount applied to the ending balance.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>

Viewing Disbursement Summary Information

Access the Disbursement Summary page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Disbursement Summary).

Batch Header	Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity	D
Batch ID: AS5G0131520040702165234		Status: Loaded				
Trans ID: DSLF050P		Queue Inst: 1		In/Out: Inbound		
<hr/>						
School Code: G01315		Region Code: 09		State Code: CA		
Customize Find View All First 1-7 of 8 Last						
Booked Loan Info		Unbooked Loan Info				
Disb Sum Type	DL End Date	Booked Gross	Booked Fee	Booked Rebate	Booked Net	
YS	06/30/2004	1801600	53516	27171	1775255	
YU	06/30/2004	246044	7342	3700	242402	
YP	06/30/2004					
YT	06/30/2004	2047644	60858	30871	2017657	
MS	06/30/2004	7511	221	111	7401	
MU	06/30/2004	1000	30	15	985	
MP	06/30/2004					

Disbursement Summary page

Field	DLSAS Field
Booked Loan Info	
Disb Sum Type	<p>Disbursement Summary Type:</p> <ul style="list-style-type: none"> YS = Year-To-Date Disbursement Total for Subsidized Loans. YU = Year-To-Date Disbursement Total for Unsubsidized Loans. YP = Year-To-Date Disbursement Total for PLUS Loans. YT = Year-To-Date Disbursement Total for Subsidized/Unsubsidized/PLUS Loans. MS = Monthly Disbursement Total for Subsidized Loans. MU = Monthly Disbursement Total for Unsubsidized Loans. MP = Monthly Disbursement Total for PLUS Loans. MT = Monthly Disbursement Total for Subsidized/Unsubsidized/PLUS Loans.
DL End Date	<p>End Date - The date representing the end of the current statement period. This account statement represents activity up to and through this date only.</p> <p>Format is CCYYMMDD.</p> <p>19000101-20991231</p>

Field	DLSAS Field
Booked Gross	<p>Booked Gross</p> <p>For Disbursement Summary Types YS, YU, YP, and YT, this is the sum of the gross amount of all actual disbursements that were booked at COD during the program year-to-date.</p> <p>For Disbursement Summary Types MS, MU, MP, and MT, this is the sum of the gross amount of all actual disbursements that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Booked Fee	<p>Booked Fee</p> <p>For Disbursement Summary Types YS, YU, YP, and YT, this is the sum of the loan fee amount of all actual disbursements that were booked at COD during the program year-to-date.</p> <p>For Disbursement Summary Types MS, MU, MP, and MT, this is the sum of the loan fee amount of all actual disbursements that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Booked Rebate	<p>Booked Interest Rebate</p> <p>For Disbursement Summary Types YS, YU, YP, and YT, this is the sum of the interest rebate amount of all actual disbursements that were booked at COD during the program year-to-date.</p> <p>For Disbursement Summary Types MS, MU, MP, and MT, this is the sum of the interest rebate amount of all actual disbursements that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Booked Net	<p>Booked Net</p> <p>For Disbursement Summary Types YS, YU, YP, and YT, this is the sum of the net amount of all actual disbursements that were booked at COD during the program year-to-date.</p> <p>For Disbursement Summary Types MS, MU, MP, and MT, this is the sum of the net amount of all actual disbursements that were booked at COD during the current month.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Unbooked Loan Info	
<p>Note. The values on this tab are reported the same way for all disbursement summary types.</p>	

Field	DLSAS Field
Disb Sum Type	<p>Disbursement Summary Type:</p> <ul style="list-style-type: none"> • YS = Year-To-Date Disbursement Total for Subsidized Loans. • YU = Year-To-Date Disbursement Total for Unsubsidized Loans. • YP = Year-To-Date Disbursement Total for PLUS Loans. • YT = Year-To-Date Disbursement Total for Subsidized/Unsubsidized/PLUS Loans. • MS = Monthly Disbursement Total for Subsidized Loans. • MU = Monthly Disbursement Total for Unsubsidized Loans. • MP = Monthly Disbursement Total for PLUS Loans. • MT = Monthly Disbursement Total for Subsidized/Unsubsidized/PLUS Loans.
Unbooked Gross	<p>Unbooked Gross. This is the total gross amount of disbursements at COD that are unbooked for the program year-to-date at the end of current reporting period.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Unbooked Fee	<p>Unbooked Fee.</p> <p>This is the total fee amount of disbursements at COD that are unbooked for the program year-to-date at the end of the current reporting period.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Unbooked Rebate	<p>Unbooked Rebate Amount.</p> <p>This is the total interest rebate amount of disbursements at COD that are unbooked for the program year-to-date at the end of the current reporting period.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>
Unbooked Net	<p>Unbooked Net.</p> <p>This is the total net amount of disbursements at COD that are unbooked for the program year-to-date at the end of the current reporting period.</p> <p>-9999999999 to 09999999999</p> <p>If no activity, zero filled.</p>

Viewing Cash Detail Information

Access the Cash Detail page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Cash Detail).

Batch Header	Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity
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Batch ID: A85G0131520040702165234 **Status:** Loaded
Trans ID: DSLF05OP **Queue Inst:** 1 **In/Out:** Inbound

School Code: G01315 **Region Code:** 09 **State Code:** CA

TransactionType	DL End Date	Transaction Date	Check Number	Transaction Amt	GAPS Cntl Nbr
R	06/30/2004	06/29/2004		50912	2004072977691
R	06/30/2004	05/07/2004		40705	2004060786979
R	06/30/2004	05/14/2004		31200	4002081494615
R	06/30/2004	05/23/2004		39985	2004062203899
R	06/30/2004	05/28/2004		49258	2004062810952
R	06/30/2004	06/04/2004		74167	2004060418411
R	06/30/2004	06/11/2004		13914	2004061028153
R	06/30/2004	06/18/2004		127899	2004061735780

Cash Detail page

Field	DLSAS Field
Transaction Type	Transaction Type—Cash Type of Cash Transaction: <ul style="list-style-type: none"> R = Cash Receipts. X = Returns of Excess Cash.
DL End Date	End Date - The date representing the end of the current statement period. This account statement represents activity up to and through this date only. Format is CCYYMMDD. 19000101-20991231
Transaction Date	Transaction Date - The date that Excess Cash is applied, or date that Draw down activity occurred. Format is CCYYMMDD. 20020622-20050927
Check Number	Check Number (if available at COD). Check Number on a check for return of excess cash returned by the school. Numeric > = 0 Can be blank.
Transaction Amt	Transaction Amount - COD amount of the cash receipt or return of excess cash transaction. -9999999999 to 09999999999 Cannot be blank; can be zero filled.

Field	DLSAS Field
GAPS Cntl Nbr	GAPS Control Number - Code received from GAPS for cash receipts only. Numeric > 0 Can be blank.

Viewing Loan Level Detail Information

Access the Loan Level Detail page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Loan Level Detail).

Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity	Batch Trailer
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Batch ID: AS5G0131520040702165234 **Status:** Loaded
Trans ID: DSLF050P **Queue Inst:** 1 **In/Out:** Inbound

School Code: G01315 **Region Code:** 09 **State Code:** CA

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Loan Actual Info		Demo Information				
DL Loan ID	DL End Date	Booked Date	DL Actual Svcr Gross	DL Actual Svcr Fee	DL Actual Svcr Rebate	DL Actl Svcr Net
496900507S04G01315001	06/30/2004	05/05/2004	3500	104	52	3448
496900507U04G01315001	06/30/2004	05/28/2004	1313	39	20	1294
410500523S04G01315001	06/30/2004	06/02/2004	3039	90	46	2995
041627113S04G01315001	06/30/2004	06/02/2004	2625	78	40	2587
571736891U04G01315001	06/30/2004	06/02/2004	1172	35	18	1155
575940269U04G01315001	06/30/2004	06/21/2004	2375	70	36	2341
576213605U04G01315001	06/30/2004	06/28/2004	2625	78	40	2587

Loan Level Detail page

Field	DLSAS Field
Loan Actual Info	
DL Loan ID	<p>Loan Identifier - Unique identifier created at the time of origination. Consists of:</p> <p>Student's Social Security Number: 001010001-999999998</p> <p>Loan Type:</p> <ul style="list-style-type: none"> S = Subsidized U = Unsubsidized P = PLUS <p>Program Year: 04</p> <p>School Code: X00000-X99999, where X = G or E</p> <p>Loan Sequence Number: 001-999</p>

Field	DLSAS Field
DL End Date	End Date - The date representing the end of the current statement period. This account statement represents activity up to and through this date only. Format is CCYYMMDD. 19000101-2099
Booked Date	Loan Booked Date at COD. Date the loan booked at COD. Format is CCYYMMDD. 19000101-20991231
DL Actual Svcr Gross	Actual Gross Amount—COD The sum of COD calculated actual gross amounts (in dollars) for the loan. Numeric > = 0
DL Actual Svcr Fee	Actual Loan Fee Amount—COD The sum of COD calculated actual loan fee amounts (in dollars) for the loan. Numeric > = 0
DL Actual Svcr Rebate	Actual Interest Rebate Amount—COD The sum of COD calculated actual interest rebate amounts (in dollars) for the loan. Numeric > = 0
DL Actual Svcr Net	Actual Net Amount—COD The sum of COD calculated actual net amount (in dollars) for the loan. Numeric > = 0
Demo Information	
DL Loan ID	Loan Identifier - Unique Identifier created at the time of origination. Consists of: Student's Social Security Number: 001010001-999999998 Loan Type: <ul style="list-style-type: none"> • S = Subsidized • U = Unsubsidized • P = PLUS Program Year: 04 School Code: X00000-X99999, where X = G or E Loan Sequence Number: 001-999

Field	DLSAS Field
Borrower's First Name	<p>Borrower's First Name - The borrower's first name. Left justified with an A-Z in the first position.</p> <p>Allowable characters:</p> <ul style="list-style-type: none"> • 0-9 • Uppercase A-Z • . (period) • ' (apostrophe) • (dash)
Borrower's Last Name	<p>Borrower's Last Name — The borrower's last name.</p> <p>Allowable characters:</p> <ul style="list-style-type: none"> • 0-9 • Uppercase A-Z • . (period) • ' (apostrophe) • (dash)
Borrower's Middle Initial	<p>Borrower's Middle Initial - The borrower's middle initial. Can be blank. Uppercase A-Z are the only allowable characters.</p>
Student's First Name	<p>Students' First Name - The student's first name (PLUS Only), left justified with an A-Z in the first position. Can be blank. Allowable characters:</p> <ul style="list-style-type: none"> • 0-9 • Uppercase A-Z • . (period) • ' (apostrophe) • (dash)
Student's Last Name	<p>Student's Last Name — The student's last name (PLUS only). Can be blank.</p> <p>Allowable characters:</p> <ul style="list-style-type: none"> • 0-9 • Uppercase A-Z • . (period) • ' (apostrophe) • (dash)

<i>Field</i>	<i>DLSAS Field</i>
Student's Middle Initial	Student's Middle Initial - The student's middle initial. Can be blank. Uppercase A-Z are the only allowable characters.

Viewing Disbursement Activity Information

Access the Disbursement Activity page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Disbursement Activity).

Cash Summary	Disbursement Summary	Cash Detail	Loan Level Detail	Disbursement Activity	Batch Trailer
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Batch ID: A85G0131520040702165234 **Status:** Loaded
Trans ID: DSLF050P **Queue Inst:** 1 **In/Out:** Inbound

School Code: **Region Code:** **State Code:**

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Disbursement Information	Amount Information	Total Information
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<u>DL Loan ID</u>	<u>Disb Number</u>	<u>Disb Seq Nbr</u>	<u>Trans Type Disb</u>	<u>Transaction Dt</u>

Disbursement Activity page

<i>Field</i>	<i>DLSAS Field</i>
Disbursement Information	
DL Loan ID	<p>Loan Identifier - Unique identifier created at the time of origination. Consists of:</p> <p>Student's Social Security Number: 001010001-999999998</p> <p>Loan Type:</p> <ul style="list-style-type: none"> • S = Subsidized • U = Unsubsidized • P = PLUS <p>Program Year: 04</p> <p>School Code: X00000-X99999, where X = G or E</p> <p>Loan Sequence Number: 001-999</p>

Field	DLSAS Field
Disb Number	Disbursement Number - The disbursement number for the current disbursement transaction. 01-04 for PLUS. 01-20 for Subsidized/Unsubsidized.
Disb Seq Nbr	Disbursement Sequence Number - The sequence number that determines the order in which the disbursement activity is processed. 01-99
Trans Type Disb	Transaction Type— Disbursement. Disbursement Activity recorded at COD: <ul style="list-style-type: none"> • A = Adjusted Disbursement Amount. • D = Disbursement • Disbursement Activity = Q is not indicated on the SAS.
Transaction Dt	Transaction Date - Date disbursement activity occurred at the school. Format is CCYYMMDD. 20020622-20050927
Amount Information	
DL Loan ID	Loan Identifier - Unique identifier created at the time of origination. Consists of: Student's Social Security Number: 001010001-999999998 Loan Type: <ul style="list-style-type: none"> • S = Subsidized • U = Unsubsidized • P = PLUS Program Year: 04 School Code: X00000-X99999, where X = G or E Loan Sequence Number: 001-999
Loan Book Dt	Loan Booked Date at COD. Date the loan booked at COD. Format is CCYYMMDD. 19000101-20991231
Disb Book Date	Disbursement Booked Date at COD. Date the individual disbursement activity booked at COD. Format is CCYYMMDD. 19000101-20991231

Field	DLSAS Field
Actual Gross	Disbursement Actual Gross Amount—COD. COD calculated actual gross amount (in dollars) of the disbursement. Numeric > =0
Actual Fee	Disbursement Actual Loan Fee Amount—COD. COD calculated actual loan fee amount (in dollars). Numeric > =0
Actual Rebate	Disbursement Actual Interest Rebate Amount—COD. COD calculated actual interest rebate amount (in dollars). Numeric > =0
Actual Net	Disbursement Actual Net Amount— COD. COD calculated actual net amount (in dollars) of the disbursement. Numeric > =0
Actual Net Adj	Disbursement Actual Net Adjustment—COD. COD calculated actual net adjustment amount (in dollars) of the disbursement. Can be blank. -99999 to 099999
Total Information	Loan Identifier - Unique identifier created at the time of origination. Consists of: Student's Social Security Number: 001010001-999999998 Loan Type: <ul style="list-style-type: none"> • S = Subsidized • U = Unsubsidized • P = PLUS Program Year: 04 School Code: X00000-X99999, where X = G or E Loan Sequence Number: 001-999
Total Gross	Total Gross Amount—COD. The sum of COD calculated actual gross amounts (in dollars) for the loan. Numeric > = 0
Total Fee	Total Loan Fee Amount—COD. The sum of COD calculated actual loan fee amounts (in dollars) for the loan. Numeric > = 0
Total Rebate	Total Interest Rebate Amount—COD. The sum of COD calculated actual interest rebate amounts (in dollars) for the loan. Numeric > =

Field	DLSAS Field
Total Net	Total Net Amount—COD. The sum of COD calculated actual net amount (in dollars) for the loan. Numeric > = 0

Viewing Trailer Information

Access the Batch Trailer page (Financial Aid, Loans, DL School Account Summary, DLSAS Import 20nn-20nn, Batch Trailer).

Cash Summary

Disbursement Summary

Cash Detail

Loan Level Detail

Disbursement Activity

Batch Trailer

Batch ID:

AS5G0131520040702165234

Status:

Loaded

Trans ID:

DSLFO5OP

Queue Inst:

1

In/Out:

Inbound

DL Trailer ID:

DL TRAILER

Record Length:

220

Number of Records:

48

Accepted Records:

Rejected Records:

Pending Records:

Loan Trailer Nbr:

1

Batch Trailer page

Field	DLSAS Field
DL Trailer ID	Trailer Record Identifier - Code to identify record as a trailer record. Must be "DL TRAILER" – uppercase.
Record Length	Data Record Length - Indicates length of the data record. 0000-9999
Number of Records	Number of Records - The number of data records included in the file. Numeric > = 0

Field	DLSAS Field
Accepted Records	<p>Total number of accepted records.</p> <p>Blank for all files sent to COD. Zero filled for all files sent to schools except:</p> <ul style="list-style-type: none"> • The Full Loan Origination Acknowledgement (DISF or DIPF) • Loan Origination Change Acknowledgement (DIOC) • MPN Promissory Note Acknowledgement (DIPA) • Disbursement Acknowledgement (DIOD—Batch Type #H Only) <p>Numeric > = 0</p>
Rejected Records	<p>Total number of rejected records.</p> <p>Blank for all files sent to COD. Zero filled for all files sent to schools except:</p> <ul style="list-style-type: none"> • The Full Loan Origination Acknowledgement (DISF or DIPF) • Loan Origination Change Acknowledgement (DIOC) • MPN Promissory Note Acknowledgement (DIPA) • Disbursement Acknowledgement (DIOD—Batch Type #H Only) <p>Numeric > = 0</p>
Pending Records	<p>Total number of pending records.</p> <p>Blank for all files sent to COD. Zero filled for all files sent to schools except MPN Note Acknowledgement (DIPA).</p> <p>Numeric > = 0</p>
Loan Trailer Nbr	Defaults to 1.

Working with the DL School Account Statement and the DL Reconciliation Reports

This section discusses how to:

- Generate the DL School Account Statement report.
- Generate the DL Reconciliation report.

Pages Used to Generate DL School Account Statement and Reconciliation Loan Destination Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
DL School Account Statement	RUNCTL_DLSAS	Financial Aid, Loans, DL School Account Statement, Generate DLSAS Report, DL School Account Statement	Generate the DL School Account Statement Report. This report prints the data in the DLSAS flat file from the EDI Manager staging tables.
DL Reconciliation Report	RUNCTL_DL_RECON	Financial Aid, Loans, DL School Account Statement, Generate Reconciliation Report, DL Reconciliation Report	Generate the DL Reconciliation Report, which compares cash detail, loan detail, and disbursement activity with institutionally-entered information in the database.

Generating the DL School Account Statement Report

Access the DL School Account Statement page (Financial Aid, Loans, DL School Account Statement, Generate DLSAS Report, DL School Account Statement).

DL School Account Statement

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Institution: PeopleSoft University

Aid Year:

DL Batch ID:

DL School Account Statement page

Use this page to run the DL School Account Statement (FADLSAS) process to print both file types, DSDFnnOP DL-SAS Import School Account Statement (Fixed-Length, Disbursement Level Loan Detail) and DSLFnnOP DL-SAS Import School Account Statement (Fixed-Length, Loan Level Loan Detail). where nn is the aid year.

This report prints the data in the DLSAS flat file from the EDI Manager staging tables. The original data the COD provides does not identify students by name, but by Loan ID number. When you run this report, the system matches the Loan IDs in the Loan Detail Records section of the report with the student ID to identify each student by name.

DL Batch ID (direct lending batch ID)

Enter the direct lending batch ID that represents the DLSAS file to include on this report. This is the School Account Statement Batch ID defined in the *Direct Lending Technical Reference*.

Important! To maintain a historical archive of the DL School Account Statement Report, rename the files generated by the report. If you do not change the file names, the system writes over the existing files when you run subsequent reports.

Note. The School Account Statement (SAS) report options are year-specific; update your report options and preferences with the COD separately for each year to change the defaults. Ensure that you use the correct program year in the SAS Report Options page before updating your options.

See Also

Common Origination and Disbursement (COD) Technical Reference COD Reports, School Account Statement section

Generating the DL Reconciliation Report

Access the DL Reconciliation Report page (Financial Aid, Loans, DL School Account Statement, Generate Reconciliation Report, DL Reconciliation Report).

DL Reconciliation Report page

DL Batch ID

Enter the DL Batch ID of a previously loaded SAS file. You cannot run this report without first loading one or more SAS files.

Reviewing the DL Reconciliation Report

The three main sections in the report are:

- Cash summary information
- Cash detail

- Loan detail

Cash Summary Information

This section of the report contains:

- Year-to-date cash summary.
- Monthly cash summary.
- Year-to-date disbursement summary by loan type.
- Monthly disbursement by loan type.

Cash Detail

The content of this section of the report depends on the information in the SAS file.

If the file contains monthly cash detail (default), the system compares the data from the SAS file to data in PS_LN_DL_CASH_DTL for the month specified only.

This section reports any mismatches where:

- Cash transactions in the SAS file are not in the database.
- Cash transactions in the database are not in the SAS file.
- Year-to-date cash detail: The system compares the data from the SAS file to all data in PS_LN_DL_CASH_DTL for the specified aid year.

The section reports any mismatches where:

- Cash transactions in the SAS file are not in the database
- Cash transactions in the database are not in the SAS file.
- No cash detail: The section contains a *No Cash Detail* message.

Loan Detail

The content of this section of the report depends on the information in the SAS file.

If the file contains monthly disbursement detail without loan summary (default), the system compares the data from the SAS file to data in PS_LOAN_DISB_ACTION for the month specified only.

The section also reports any mismatches where:

- Disbursement transactions in the SAS file are not in the database.
- Disbursement transactions in the database are not in the SAS file.

- Disbursement transactions that match based on disbursement number and disbursement sequence number have differing amounts or dates.

Note. You can use the disbursement sequence number to compare information from the SAS file against the database.

- Year-to-date disbursement detail: The system compares the data from the SAS file with the sum of data in PS_LOAN_DISBMNT where LOAN_PAID_IND = "Y" and with data in PS_LOAN_DISB_ACTN.

The section reports any mismatches at the loan level where:

- Loan level records in the SAS file are not in the database.
- Loan level records in the database that have a disbursed amount greater than zero are not in the SAS file.
- Loan level records that match based on loan ID have differing gross, fee, rebate, or net amounts.

The section also reports any mismatches at the disbursement activity level where:

- Disbursement transactions in the SAS file are not in the database.
- Disbursement transactions in the database (that have a disbursed amount greater than zero) are not in the SAS file.
- Disbursement transactions that match based on disbursement number and disbursement sequence number have differing amounts or dates.
- Year-to-date loan level detail: The system compares the data from the SAS file with the sum of data in PS_LOAN_DISBMNT where LOAN_PAID_IND = "Y."

The section reports any mismatches where:

- Loan level records in the SAS file are not in the database.
- Loan level records in the database that have a disbursed amount greater than zero are not in the SAS file
- Loan level records that match based on loan ID have differing gross, fee, rebate, or net amounts.
- No loan detail: The section contains a "No Loan Detail" message.

The format of the loan detail section of the report also depends on the data included in the SAS file.

Reviewing SAS Files with Monthly Disbursement Level Detail Only

For SAS files with monthly disbursement level detail only (no loan level detail), the section contains the following information for each loan ID:

<i>Field</i>	<i>Row 1</i>	<i>Row 2</i>	<i>Row 3</i>	<i>Row 4</i>
EmplID	From PeopleSoft data.			

Field	Row 1	Row 2	Row 3	Row 4
Student Name	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)		
Loan ID	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)		
Disbursement Number			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Disbursement Sequence Number			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Transaction Type			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Disbursement Date			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Gross Amount	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Loan Fee Amount	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Interest Rebate Amount	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Net Amount	From PeopleSoft loan data.	From COD loan data (pulled from the Total fields provided on the disbursement detail record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.

Field	Row 1	Row 2	Row 3	Row 4
Disbursement Actual Net Adjustment Amount			From PeopleSoft disbursement transaction data	From COD disbursement transaction data.
Transaction Date			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.

Note. Rows 3 and 4 repeat for each disbursement transaction associated with the loan ID.

For SAS files with year-to-date disbursement level detail and loan level summary, the section contains the following information for each loan ID:

Field	Row 1	Row 2	Row 3	Row 4
EmplID	From PeopleSoft loan data.			
Student Name	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)		
Loan ID	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)		
Disbursement Number			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Disbursement Sequence Number			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Transaction Type			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Disbursement Date			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Gross Amount	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Loan Fee Amount	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.

Field	Row 1	Row 2	Row 3	Row 4
Loan/Disbursement Actual Interest Rebate Amount	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Loan/Disbursement Actual Net Amount	From PeopleSoft loan data.	From COD loan data (pulled from loan level summary record)	From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Disbursement Actual Net Adjustment Amount			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.
Transaction Date			From PeopleSoft disbursement transaction data.	From COD disbursement transaction data.

Note. Rows 3 and 4 repeat for each disbursement transaction associated with the loan ID.

For SAS files with year-to-date loan level detail (loan level detail only), the section contains the following information for each loan ID:

Field	Row 1	Row 2
EmplID	From PeopleSoft loan data.	
Student Name	From PeopleSoft loan data.	From COD loan data.
Disbursement Number		
Disbursement Sequence Number		
Transaction Type		
Disbursement Date		
Loan/Disbursement Actual Gross Amount	From PeopleSoft loan data.	From COD loan data.
Loan/Disbursement Actual Loan Fee Amount	From PeopleSoft loan data.	From COD loan data.
Loan/Disbursement Actual Interest Rebate Amount	From PeopleSoft loan data.	From COD loan data.
Loan/Disbursement Actual Net Amount	From PeopleSoft loan data.	From COD loan data.

Field	Row 1	Row 2
Disbursement Actual Net Adjustment Amount		
Transaction Date		

Running Direct Lending Reports

Most Direct Lending reports are generated from a generic run control page, but some reports have their own run control pages. The run control pages for a few other reports appear within the business process discussion earlier in this chapter.

This section discusses how to:

- Use the generic run control page for Direct Lending reports.
- Generate the Direct Lending Loan Booking Status Report.
- Use demographic data selection for loan origination.

Pages Used to Run Direct Lending Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Financial Aid Reports	RUN_CNTL_DL_RPT	<ul style="list-style-type: none"> Financial Aid, Loans, Direct Lending Reconciliation, Disbursement Errors Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Accepted Originations Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Loans on Hold Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, PLUS Credit Decisions Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Rejected Originations Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Origination Export Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Change Pending Status Report, Financial Aid Reports Financial Aid, Loans, Direct Lending Reconciliation, Validation Errors Report, Financial Aid Reports 	Generate many of the Direct Lending reports. The navigation path varies depending on the report that you generate.

Page Name	Definition Name	Navigation	Usage
		<ul style="list-style-type: none"> Financial Aid, Loans, Direct Lending Reconciliation, Inbound Errors Report, Financial Aid Reports You can access the Financial Aid Reports page through multiple navigation paths in addition to the paths listed above. 	
DL Booking Status Report	RUN_CNTL_FADLBOOK	Financial Aid, Loans, Direct Lending Reconciliation, Booking Status Report, DL Booking Status Report	Generate the Direct Lending Originations Booking report (FADLBOOK).

Using the Generic Run Control Page for Direct Lending Reports

Access the Financial Aid Reports page (Financial Aid, Loans, Direct Lending Reconciliation, Disbursement Errors Report, Financial Aid Reports).

Financial Aid Reports

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Academic Institution: PeopleSoft University
Aid Year: Financial Aid Year 2008 - 2009

Financial Aid Reports page

Select the Academic Institution and Aid Year for which to run the report.

Generating the Direct Lending Loan Booking Status Report


Access the DL Booking Status Report page (Financial Aid, Loans, Direct Lending Reconciliation, Booking Status Report, DL Booking Status Report).

DL Booking Status Report

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

Academic Institution:

PSUNV 


PeopleSoft University

Aid Year:

2009 

Financial Aid Year 2008 - 2009

DL Booked Status:

Booked 

DL Booking Status Report page

Select the Academic Institution and Aid Year for this report. For the Direct Lending Booked Status, select *Booked* or *Unbooked* loans.

Using Demographic Data Selection for Loan Origination

The loan processes use three types of demographic data, address, phone number, and name. The views used to access this data are:

- LN_MAIL_ADDR_VW
- LN_PERM_ADDR_VW
- LN_PHONE_VW
- LN_NAME_VW

Chapter 38

Processing Pell Payments

This chapter provides an overview of Pell payment processing and discusses how to:

- Create Pell origination records.
- Manage Pell origination.
- View Pell disbursement data.
- Change career statuses.
- Select Pell data request types.
- Send Pell data requests.
- Verify outbound Pell data requests.
- Load Pell data requests.
- Verify inbound Pell data requests.
- Track requests for funds from the Grants Administration and Payment System (GAPS).
- Send Pell payment records for phase-in.
- Verify outbound payment data.
- Receive Pell records for phase-in.
- Load and move Pell acknowledgment data.
- Verify inbound payment data for phase-in.

Understanding Pell Payment Processing

This section discusses:

- Pell payment processing.
- Pell processing action codes.

Pell Payment Processing

The Pell payment process begins with the submission of an origination or origination and disbursement record for payment. You use origination data to verify a student's eligibility, identify possible conflicts with other institutions, and initiate disbursement record processing. After the origination record is received and processed, you can import an acknowledgment and response into the Campus Solutions system. The response contains the status, such as accepted, accepted with corrections, duplicate, or rejected.

Use the disbursement record to report a disbursement or expected disbursement for each student. After origination is accepted, you can process a disbursement record. If you send both records simultaneously, the system processes originations before disbursement.

Pell Processing Action Codes

This table lists Pell processing action codes:

<i>Process Type</i>	<i>Pell Proc Status</i>	<i>Pell Trans Status</i>	<i>Pell Orig Status</i>	<i>Pell Orig Action</i>	<i>Pell Disb Status</i>	<i>Action Code</i>	<i>Disb Detail</i>
After award not originated	Pending	NA	NA	NA	NA	Blank	NA
Origination	Selected	Ready	Originated	Originated	Originated	Blank	Originated
Origination without Originate Offered Awards option checked.	Pending	NA	NA	NA	NA	Blank	NA
Outbound origination	Reported	Transmitted	Transmitted	Origination transmitted	Originated	Blank	Originated
Inbound origination with action code of A.	Reported	Ready	Accepted	Origination acknowledgment received.	Originated	Blank	Originated

<i>Process Type</i>	<i>Pell Proc Status</i>	<i>Pell Trans Status</i>	<i>Pell Orig Status</i>	<i>Pell Orig Action</i>	<i>Pell Disb Status</i>	<i>Action Code</i>	<i>Disb Detail</i>
Inbound origination with action code of C.	Reported	Ready	Corrected	Origination acknowledgment with corrections.	Originated	Blank	Originated
Inbound origination with action code of C and Pell setup Option is Hold Corrections.	Reported	On Hold	Corrected	Origination acknowledgment with corrections.	Originated	Blank	Originated
Inbound origination with action code of E.	Reported	On Hold	Rejected	Origination acknowledgment rejected.	Originated	Blank	Originated
Outbound disbursement	Reported	Transmitted	Accepted	Origination acknowledgment received.	Trans.	Blank	Disbursement transmitted
Inbound disbursement with action code of A.	Reported	Ready	Dep. on origination status.	Dep. on origination status.	Disbursed	Accepted	Disbursement acknowledgment
Inbound disbursement with action code of C.	Reported	Ready	Dep. on origination status.	Dep. on origination status.	Disbursed	Corrected	Disb. Acc with Corrections
Inbound disbursement with action code of C and Pell setup option is Hold Corrections.	Reported	On Hold	Dep. on origination status.	Dep. on origination status.	Disbursed	Corrected	Disb. Acc with Corrections

<i>Process Type</i>	<i>Pell Proc Status</i>	<i>Pell Trans Status</i>	<i>Pell Orig Status</i>	<i>Pell Orig Action</i>	<i>Pell Disb Status</i>	<i>Action Code</i>	<i>Disb Detail</i>
Inbound disbursement with action code of E.	Reported	On Hold	Dep. on origination status.	Dep. on origination status.	Rejected	Rejected	Disbursement rejected

Note. A corrected status shows a new row indicating that the corrected row was replaced. A rejected disbursement record enables the Resend button which resets the Pell disbursement status to *Originated*.

Creating Pell Origination Records

The origination record establishes a student's eligibility for a specific annual award of federal Pell Grant program funds. It includes the student's annual amount calculated by your institution and cost of attendance.

This section discusses how to generate Pell origination records.

Page Used to Create Pell Origination Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Origination	RUNCTL_PELLORIG	Financial Aid, Pell Payment, Originate Pell Payment, Origination	Generate Pell origination records.

Generating Pell Origination Records

Access the Origination page (Financial Aid, Pell Payment, Originate Pell Payment, Origination).

Origination

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Control Information

*Institution: PSUNV *Aid Year: 2008 *Pell ID Reporting: 001315 ☒ Student Override

Student Override List
Find | View All First 1 of 1 Last

ID:	FA0867	Murray, Rebecca F
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Origination page

Use this page to initiate the Pell Origination COBOL SQL process (FAPPLBLO). You can insert a new row to process additional students.

Student Override	Select to originate a Pell Grant for an individual student or a select group of students.
ID	Select to process an individual student or a group of students. Only students who have been awarded Pell and have a Pell process status of pending appear in the values.

Managing Pell Origination

The origination process creates a unique ID for the student, sets the Pell processing status to selected, sets the Pell transaction status to ready, and displays the date and time that the process was run.

This section discusses how to:

- Review results of Pell origination.
- Review Pell processing status.
- Review Pell origination action detail.
- Review Pell origination message detail.

Pages Used to Manage Pell Origination

Page Name	Definition Name	Navigation	Usage
Pell Origination	PELL_ORIG_1	Financial Aid, Pell Payment, Manage Pell Payment, Pell Origination	Review results of Pell origination.
Pell Information	PELL_INFO_SEC	Click the Pell Info button on the Pell Origination page.	Review or change the Pell processing status.
Origination Ed Use Flags (origination education use flags)	PELL_ORG_EDUSE_SEC	Click the Ed Flags link on the Pell Origination page.	View notification that modifications have been made to your database.
Pell Orig Action Detail (Pell origination action detail)	PELL_ORIG_SEC	Click the Orig Status link on the Pell Origination page.	Review Pell origination action detail, including the ID, action sequence, and batch number.
Pell Orig Message Detail (Pell origination message detail)	PELL_ORIG_MSG_SEC	Click the Origination Message link on the Pell Orig Action Detail page.	Review Pell origination message detail.

Reviewing Results of Pell Origination

Access the Pell Origination page (Financial Aid, Pell Payment, Manage Pell Payment, Pell Origination).

Pell Origination

Pell Disbursement

Pell Disb/Career

Asby,Aisha T
ID: FA0862

Aid Year: 2010 Financial Aid Year 2009 - 2010
Institution: PSUNV

Pell Origination ID: 216031113AS201000131500
Pell ID Reporting: 001315

[Pell Info](#)
[Orig Status](#)

☐ Update Pell Origination

Pell Trans Stat: Ready 09/17/2009 8:47AM

Pell Orig Stat: Originated 09/17/2009 8:47AM

MRR Stat:

Customize | Find | View All | First 1 of 1 Last

Org Detail

Setup Info

Other Information

Original SSN	Name CD	Attended Pell ID	Action Cd	Total Pell	Additional Pell	ED Verf Cd	Enroll Stat	Pell EFC	Sec EFC	Citizen Ovrd
216-03-1113	AS	001315		\$4000.00	N	T	1	\$0		NonCitizen

Pell Origination page, Org Detail tab

Pell Info(Pell information)

Click to access the Pell Information page to view or change the Pell processing status.

Orig Status (origination status)	Click to access the Pell Orig Action Detail page to view the Pell origination ID, action sequence, and batch number.
Update Pell Origination	Select to run origination again. This changes the Pell processing status back to pending. The origination process does not pick up anything with a status other than pending. The Pell Trans Status field must be set to <i>Ready</i> to run origination again.
Pell Trans Stat (Pell transaction status)	<p>Select a value to reset the status. Values are: <i>Review</i>, <i>On Hold</i>, <i>Ready</i>, <i>Transmitted</i>, and <i>Cancel</i>.</p> <p>For example, if you receive a rejected record, the Pell transaction status is set to <i>On Hold</i>. You can correct the record, change the status to <i>Ready</i>, and resend the origination. After the system has transmitted the record, this field is unavailable until you receive an acknowledgment of the process.</p>
Pell Orig Stat (Pell origination status)	<p>Displays the Pell origination status when the system transmits records. Values are:</p> <p><i>Accepted</i>: Indicates an accepted acknowledgment record.</p> <p><i>Canceled</i>: Indicates a canceled Pell award from the system. Run origination again to resend.</p> <p><i>Change to Origination</i>: Indicates that a change was made to the student's origination record. The origination build program sets this status after you run origination. This occurs if you cancel an award or if you select the student's record using the Update Pell Origination check box.</p> <p><i>Corrected</i>: Indicates an accepted record with corrections.</p> <p><i>Originated</i>: Indicates that the origination process ran successfully.</p> <p><i>Rejected</i>: Indicates a rejected record. If the record is rejected, the system sets the processing status to <i>Review</i> and the transmitted status to <i>On Hold</i>.</p> <p><i>Transmitted</i>: Indicates that a transmit record has been built and can be exported. A corresponding response record for the student must be received before you can run another process for the student. This includes running the origination build program, requesting an outbound of a subsequent origination record, or running the outbound disbursement process.</p>

MRR Stat (multiple reporting record status)	<p>Displays originations and disbursements reported by more than one institution for the same student. Use this information to identify and resolve potential over award payments and concurrent enrollments before they occur. When you request multiple reporting records and load them into the system, the status of the data updates this field.</p> <p>Values are:</p> <p><i>Blocked Institution</i></p> <p><i>Blocked and Concurrent</i></p> <p><i>Blocker Institution</i></p> <p><i>Blocker/Concurrent Enrlm</i> (blocker and concurrent enrollment)</p> <p><i>Concurrent Enrollment Institution</i></p> <p><i>Disbursed Institution</i></p> <p><i>None Found</i></p> <p><i>Originated Institution</i></p> <p><i>Shared SAR ID</i> (shared student aid report ID)</p> <p><i>Unblocked Institution</i></p> <p><i>Verification W</i> (verification without documentation)</p>
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Org Detail

Original SSN (original social security number)	Displays the student's social security number from the original Free Application for Federal Student Aid (FAFSA).
Name CD (name code)	Displays the student's name code from the original FAFSA. If the social security number and name code do not match the origination ID, the system rejects the record.
Attended Pell ID	Displays the Pell ID of the campus that the student is attending.
Action Cd (Action Code)	<p>Displays a code to indicate the status of an acknowledgment record. Values are:</p> <p><i>A</i>: Accepted—all fields accepted.</p> <p><i>C</i>: Corrected—one or more fields corrected.</p> <p><i>D</i>: Duplicate.</p> <p><i>E</i>: Rejected—record was rejected.</p>
Total Pell	Displays the student's total award amount for the school year.

Additional Pell	<p>Displays the additional eligibility indicator. The Common Origination and Disbursement process reports additional eligibility as a result of a second Pell (Pell2) item type. Values are:</p> <p><i>N</i>: No additional Pell eligibility</p> <p><i>Y</i>: Additional Pell eligibility</p>
ED Verf Cd (education verification code)	<p>Displays the verification status of the applicant's data. Values are:</p> <p><i>A</i>: Accurate</p> <p><i>C</i>: Calculated</p> <p><i>T</i>: Tolerance</p> <p><i>R</i>: Reprocessed</p> <p><i>V</i>: Verified</p> <p><i>W</i>: Without documentation</p> <p><i>S</i>: Selected but not verified</p> <p>Blank.</p> <hr/> <p>Note. When the system builds origination, it builds the value defined on the student aid attribute record or Packaging Status Summary. When you outbound the data, the system sets the value to that required by the technical reference record layout. The system sets the values V, W, S, or Blank.</p> <hr/>
Enroll Stat (Enroll Status)	<p>Not required to be reported. Displays the code that applies to the student's expected enrollment status for the award year. Values are:</p> <p><i>1</i>: Full-time</p> <p><i>2</i>: Three-quarter-time</p> <p><i>3</i>: Half-time</p> <p><i>4</i>: Less than half-time</p> <p><i>5</i>: Other</p>
Pell EFC (Pell expected family contribution)	<p>Not required to be reported. Displays the student's EFC from the Institutional Student Information Record (ISIR) or Student Aid Report (SAR).</p>
Sec EFC (secondary expected family contribution)	<p>Displays a code to indicate which expected family contribution value is used to determine the award amount. Values are:</p> <p><i>0</i>: Pell award was reported previously based on the secondary EFC. Award is now based on the original EFC.</p> <p><i>S</i>: The Pell Grant award is based on the secondary EFC.</p>
Citizen Ovrd (Citizenship Override)	<p>Select to report a local override of the student's citizenship status. This field is display only when the record is transmitted, corrected, or acknowledged or when a Multiple Reporting Record file is loaded. Valid values are <i>Ineligible</i>, <i>NonCitizen</i> and, <i>US Citizen</i>.</p>

Setup Info

Select the Setup Info tab.

Pell Origination		Pell Disbursement		Pell Disb/Career	
Southers, Joshua P			ID: FA0868		
Aid Year: 2008 Financial Aid Year 2007 - 2008			Institution: PSUNV		
Pell Origination ID: 083631119SO200800131500			Pell ID Reporting: 001315		
Pell Info Orig Status <input type="checkbox"/> Update Pell Origination			Pell Trans Stat: Ready 10/22/2008 11:45AM Pell Orig Stat: Corrected 10/22/2008 11:44AM MRR Stat:		
Customize Find View All First 1 of 1 Last					
Org Detail		Setup Info		Other Information	
Pell Enroll Dt	Low T & F Flag	Trans Nbr	Pay Method	Pell COA	Sched Pell
09/06/2007		1		\$23800.00	
Weeks Calc	Weeks Acad Yr				

Pell Origination page: Setup Info tab

Pell Enroll Dt (Pell enroll date)	Displays the first date on which the student was enrolled in an eligible program for the designated school year.
Low T&F Flag (low tuition and fees flag)	The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year. Values are: <i>(none)</i> , <i>O</i> , <i>Range 1</i> , <i>Range 2</i> , <i>Range 3</i> , and <i>Range 4</i> .
Trans Nbr (transaction number)	Displays the transaction number from an eligible ISIR or SAR used to calculate the award.
Pay Method	Not required to be reported. Displays the payment method formula.
Pell COA (Pell cost of attendance)	Displays the cost of attendance used to calculate the Pell award amount. It must equal the COA calculated by the institution following the Pell Grant payment regulations.
Sched Pell (schedule Pell)	Displays the maximum amount of the Pell award for which a student is eligible based on full-time enrollment. The student cannot exceed the scheduled Pell award amount.
Weeks Calc (weeks calculated)	Not required to be reported. Displays the number of weeks of instructional time in which the student is enrolled and paid, as part of the academic year or program as defined for each payment methodology.
Weeks Acad Yr (weeks academic year)	Not required to be reported. Displays the number of weeks of instructional time in the program's academic year.

Prev EFC (previous expected family contribution)	Displays the previous expected family contribution, if a change has been made.
Prev Sec EFC Cd (previous secondary expected family contribution code)	Displays the previous secondary expected family contribution.
Prev COA (previous cost of attendance)	Displays the previous cost of attendance based on a change to the student's cost of attendance.

Reviewing Pell Processing Status

Access the Pell Information page (click the Pell Info button on the Pell Origination page).

Pell Information

Pell Processing Status:

Pending

Transaction Nbr:

2

Effective Date:

05/12/2008

Effective Sequence:

0

Academic Career:

UGRD

Primary Academic Program:

FAU

Academic Plan:

ARTHIST

☐ Pell Student Level Override

Low T & F Flag:

Academic Calendar:

Payment Methodology:

Hours/Credits in Acad Year:

Weeks in Program Acad Year:

Incarcerated Code:

Not Incar

☐ Use Fulltime Enrollment

☐ Originate Offered Awards

☐ Originate Max Pell Award

Pell Information page

The origination process defines the students for Pell payment processing, sets the Pell processing status to selected, sets the Pell transaction status to ready, and displays the date and time that the process was run. You can override the transaction after you originate, but you must do this before you run any outbound process.

Pell Processing Status	<p>Displays the Pell processing status. The system changes this field based on the process that you run for a student. Values are:</p> <p><i>Pending:</i> When a student is awarded a Pell Grant, the system sets the status to pending, regardless of whether the award is in offer status or accepted status. When you run origination, the system looks for students whose status is set to pending and whose Pell Grant is accepted.</p> <p><i>Reported:</i> When you outbound the Pell origination record, the system changes the status from selected to reported.</p> <p><i>Send:</i> The system changes the status from pending to send if the process was successful.</p>
Transaction Nbr (transaction number)	<p>Select the transaction number. The system retrieves the latest effective-dated row for the student. You can override this by selecting the ISIR transaction number to originate. For example, if you have multiple official ISIRs for a student, you can select the ISIR transaction to send. If you know that the student is eligible for more Pell awards using a prior ISIR, you can enable the system to use that transaction instead of the last official one.</p> <hr/> <p>Note. When you initially run Pell origination, the system retrieves the latest effective-dated row with an official EFC status for the student. After you originate, but before you run any outbound processes, you can override the transaction by selecting a value, setting the students' Pell processing status to pending and running origination again.</p> <hr/> <p>The system reoriginates the record with the data from the selected transaction. The record includes the appropriate student identifier such as SSN, date of birth, and last name.</p>
Effective Date	<p>Select an effective date that matches the transaction number that you selected. For example, if a student has three official ISIRs, a transaction number is assigned to each effective date. If you decide to use transaction 2, select the effective date from the values with the matching transaction number.</p>
Effective Sequence	<p>Select an effective sequence that coincides with the ISIR transaction number and effective date.</p>
Academic Career	<p>Select the student's academic career defined by your institution.</p>
Primary Academic Program	<p>Select the primary academic program defined by your institution.</p>
Academic Plan	<p>Select the academic plan defined by your institution.</p>
Pell Student Level Override	<p>Select to override the payment information at the student level that you set up on the Payment Setup page.</p>
Low T&F Flag (low tuition and fees flag)	<p>The system uses this field to identify tuition ranges when the annual tuition falls into the low tuition category as mandated by the Department of Education for each award year. Values are: <i>(none)</i>, <i>O</i>, <i>Range 1</i>, <i>Range 2</i>, <i>Range 3</i>, and <i>Range 4</i>.</p>

Academic Calendar	Not required to be reported. Select the academic calendar type. Values are: <i>Clock Hour</i> <i>Crdt Hr NS</i> (credit hour nonstandard terms) <i>Quarter</i> <i>Semester</i> <i>Trimester</i> <i>Hr w/o Terms</i> (hour without terms)
Payment Methodology	Not required to be reported. Select the payment methodology or the formula used to calculate the student's Pell Grant award. Values are: <i>Formula 1</i> , <i>Formula 2</i> , <i>Formula 3</i> , <i>Formula 4</i> , <i>Formula 5</i> , and <i>(none)</i> .
Hours/Credits in Acad Year (hours or credits in academic year)	Not required to be reported. Enter the number of hours or credits in the program's academic year.
Weeks in Program Acad Year (weeks in program academic year)	Not required to be reported. Enter the number of weeks of instructional time in the program's academic year.
Incarcerated Code	Enter one of these values: <i>N</i> : No longer incarcerated <i>Y</i> : Incarcerated (blank): Not incarcerated.
Use Fulltime Enrollment	Select to use full-time enrollment. The system builds the field for all originated students using full-time enrollment, regardless of the student's actual enrollment. For example, if you select this check box and a student is enrolled part-time, the system reports the student as full-time. To report and originate a student as full-time with maximum Pell, you must also select the Originate Max Pell Award check box.
Originate Offered Awards	Select to originate Pell awards with an award status of offered. If this check box is cleared, the system only originates Pell awards when the award status is accepted.
Originate Max Pell Award (originate maximum Pell award)	Select to originate Pell awards based on the maximum Pell award defined on the Pell Payment Setup page. The system originates the maximum Pell amount regardless of how much the student was offered for the Pell award.

Reviewing Pell Origination Action Detail

Access the Pell Orig Action Detail page (click the Orig Status link on the Pell Origination page).

PELL ORIG ACTION DETAIL			
Pell Origination ID:		146731111ST200800131500	Total Pell Award: \$2500.00
Origination Action Detail			
		Find View All	First 1-4 of 5 Last
Seq: 5	Code: Origination Transmitted	Date: 04/24/2008 9:47AM	
	Document ID: 2008-04-24T09:47:08.0476543210	User: PS	Origination Message
Seq: 4	Code: Change to Origination	Date: 04/24/2008 9:39AM	
	Document ID:	User: PS	Origination Message
Seq: 3	Code: Orig Acknowledgement Received	Date: 04/24/2008 9:15AM	
	Document ID: 2008-04-24T09:03:55.0976543210	User: PS	Origination Message
Seq: 2	Code: Origination Transmitted	Date: 04/24/2008 9:03AM	
	Document ID: 2008-04-24T09:03:55.0976543210	User: PS	Origination Message

Pell Orig Action Detail page

This page displays the history of the student's origination record. If the student's record has been originated, the system displays the status as originated. If the record has been transmitted, the system displays the status as transmitted. The system maintains a historical record of the action that you take when processing a student and increases the Pell origination sequence number for each action. The first sequence is when you originate the record, the second sequence is when you transmit the origination, and the third sequence is when the origination is received or acknowledged. If a change occurs to the origination record, the system inserts a new sequence with an appropriate description of the action.

Seq (sequence), Code, and Date	Displays the action sequence number, the description of the action, and the date and time that the action was performed. Whenever an action takes place that affects the student with regard to a process, the system inserts a row. For example, the system inserts a row for the outbound origination and for an origination.
User	Displays the name of the person who performed the action.
Origination Message	Click this link to access the Pell Origination Message Detail page, where you can view Pell origination action messages.

Reviewing Pell Origination Message Detail

Access the Pell Orig Message Detail page (click the Origination Message link on the Pell Orig Action Detail page).

PELL ORIG MESSAGE DETAIL

Origination Action

Seq:3

Description:Orig Acknowledgement Received

Date:04/24/2008 9:15AM

Document ID:

2008-04-24T09:03:55.0976543210

Pell Orig Action Messages

Find | View All

First1 of 1Last

Seq:Msg:

Description:

Severity:

Pell Orig Message Detail page

Viewing Pell Disbursement Data

This section discusses how to:





- Review Pell disbursement results.
- Review Pell disbursement action detail.

Pages Used to View Pell Disbursement Data

Page Name	Definition Name	Navigation	Usage
Pell Disbursement	PELL_DISB_2	Financial Aid, Pell Payment, Manage Pell Payment, Pell Disbursement	Review Pell disbursement results.
Pell Disb Action Detail (Pell disbursement action detail)	PELL_DISB_SEC	Click the Disbursement Detail link on the Pell Disbursement page (Other Information tab).	Review Pell disbursement action detail.

Reviewing Pell Disbursement Results

Access the Pell Disbursement page (Financial Aid, Pell Payment, Manage Pell Payment, Pell Disbursement).

Pell Origination		Pell Disbursement		Pell Disb/Career			
Mocny, Harry		ID: FAPLL0013		  			
Aid Year: 2010 Financial Aid Year 2009 - 2010		Institution: PSUNV					
Pell Origination ID: 606690013LE201000131500							
Customize Find View All  First 1-3 of 3 Last							
Disbursement Detail		COD Info		Other Information			
Item Type	Disb ID	Pell Dsb Amt	Pell Disb Dt	Pell Act DisbDt	Pell Disb Status	Action Code	Pell YTD Dsb'd
9000000000389	01	\$2000.00	10/01/2008		Disbursed	Accepted	\$3000.00
9000000000393	01	\$1000.00	11/01/2008		Disbursed	Accepted	\$3000.00
9000000000393	02	\$1000.00	06/01/2010		Originated		

Pell Disbursement page: Disbursement Detail tab

Disbursement Detail

Item Type Displays the code for the financial aid item type.

Disb ID(disbursement ID) Indicates the ID number assigned to the disbursement record.

Pell Dsb Amt (Pell disbursement amount) Displays the amount of the disbursement.

Pell Act DisbDt (Pell actual disbursement date) Displays the actual date that Pell was disbursed to the student's account.

Pell Disb Status (Pell disbursement status) Displays the Pell disbursement status, based on origination, disbursement, or any other outbound process. Values are: *Originated*, *Disbursed*, and *Transmitted*.

Action Code Displays the action. The value is a result of the acknowledgment record. Values are:

Accepted: All fields accepted.

Corrected: One or more fields corrected.

Duplicate: Duplicate record or field.

Rejected: Record was rejected.

Pell YTD Dsb'd (Pell year-to-date disbursed) Displays the total year-to-date number of disbursements received and accepted by your institution.

COD Info

Select the COD Info tab.

Pell Origination		Pell Disbursement		Pell Disb/Career	
Mocny,Harry		ID:		FAPLL0013	
Aid Year: 2010 Financial Aid Year 2009 - 2010		Institution:		PSUNV	
Pell Origination ID: 606690013LE201000131500					
Customize Find View All First 1-3 of 3 Last					
Disbursement Detail		COD Info		Other Information	
Item Type	Disb ID	COD Disb Num	COD Disb Seq	COD Disb Amt	
9000000000389	01	1	1	2000.00	
9000000000393	01	2	1	1000.00	
9000000000393	02	3	1	1000.00	

Pell Disbursement page: COD Info tab

Item Type Displays the code for the financial aid item type

Disb ID(disbursement ID) Indicates the ID number assigned to the disbursement record.

COD Disb Num Displays the disbursement number reported for a particular disbursement (common origination and disbursement number) sequence.

COD Disb Seq (common origination and disbursement sequence) Displays the number that determines the order in which transactions must be processed for a particular disbursement number.

COD Disb Amt(common origination and disbursement amount) Displays the amount of funds credited or expected to be credited to a student's account.

Other Information

Select the Other Information tab.

Pell Origination		Pell Disbursement		Pell Disb/Career	
Mocny, Harry			ID: FAPLL0013		
Aid Year: 2010 Financial Aid Year 2009 - 2010			Institution: PSUNV		
Pell Origination ID: 606690013LE201000131500					
Customize Find View All First 1-3 of 3 Last					
Disbursement Detail		COD Info		Other Information	
Item Type	Disb ID	Payment Period Start Date	RFMS Disb Seq		
900000000389	01	05/23/2009	2	Disbursement Detail	Ed Flags
900000000393	01	08/30/2009	1	Disbursement Detail	Ed Flags
900000000393	02	01/24/2010		Disbursement Detail	

Pell Disbursement page: Other Information tab

Item Type Displays the code for the financial aid type.

Disb ID(disbursement ID) Indicates the ID number assigned to the disbursement record.

Payment Period Start Date Displays the beginning date of the payment period. This is not a required field. The system displays this field if you select the Payment Period Start Date Req option on the Pell Institution Address setup page.

Disbursement Detail If available, click to view Pell disbursement action detail, such as the origination ID, disbursement amount, date of the action, and batch number.

Ed Flags (education flags) If available, click to view the education use flags from the inbound record. These are set to inform you of modifications that were made to your database. Education use flags are also activated when the record is rejected, and they require immediate action.

Reviewing Pell Disbursement Action Detail

Access the Pell Disb Action Detail page (click the Disbursement Detail link on the Pell Disbursement page (Other Information tab).

PELL DISB ACTION DETAIL			
Pell Origination ID:	146731111ST200800131500	Pell Dsb Amt:	\$834.00
RFMS Dsb Seq:	1	Item Type:	900000000370
		Disb ID:	01
Disbursement Detail			
Find View All First 1-3 of 4 Last			
Seq: 4	Action Code: Disbursement Transmitted	Date: 04/24/2008 9:47AM	
	Document ID: 2008-04-24T09:47:08.0476543210	User: PS	Disbursement Messages
Seq: 3	Action Code: Originated	Date: 04/24/2008 9:33AM	
	Document ID:	User: PS	Disbursement Messages
Seq: 2	Action Code: Originated	Date: 04/24/2008 9:25AM	
	Document ID:	User: PS	Disbursement Messages

Pell Disb Action Detail page

Document ID Displays the document identification that the system assigns to each student receiving a Pell Grant.

Disbursement Messages Click to view the Pell Disbursement Message Detail page.

Changing Career Statuses

This section provides an overview of changing career statuses and discusses how to change a student's career.

Understanding Changing Career Statuses

You change a student's Pell award based on changes in the student's career. For example, assume that after you award a student a Pell Grant using an undergraduate career for the year—fall and spring terms, the student changes to an undergraduate engineering career for the spring term. You must cancel the spring Pell under the undergraduate career and award the spring Pell again, this time with the undergraduate engineering career on the award entry page. You can then use the Pell Disb/Career page to make the change to the career for the spring term before running the origination process.

After you revise the student's Pell award, the system resets the Pell processing status to pending. However, because no changes have been made to the student's origination or disbursement detail, the origination process does *not* find this student. Career is not used by Pell for payment acceptance, so the system does not outbound this data.

If you do not correct the Career field after a career change, the system picks up the cancelled award under the old career, and if that award was disbursed, the Pell process returns a negative disbursement.

Note. You should correct the Career field after a career change. Otherwise, the system sends a disbursement request under the new career. This can result in confusion with the Department of Education, because you are simultaneously cancelling a disbursement and requesting a disbursement for the same disbursement period for the same student.

Page Used to Change Careers

Page Name	Definition Name	Navigation	Usage
Pell Disb/Career (Pell disbursement and career)	PELL_DISB_1	Financial Aid, Pell Payment, Manage Pell Payment, Pell Disb/Career	Change a career on any disbursement row that was previously processed using an old career.

Changing a Student's Career

Access the Pell Disb/Career page (Financial Aid, Pell Payment, Manage Pell Payment, Pell Disb/Career).

Pell Origination

Pell Disbursement

Pell Disb/Career

Mocny,Harry

ID: FAPLL0013

Aid Year: 2010 Financial Aid Year 2009 - 2010

Institution: PSUNV

Pell Origination ID: 606690013LE201000131500

[Customize](#) | [Find](#) | [View All](#) |

First

1-3 of 3

Last

Disb/ Career Detail

Other Information

Career	Item Type	Disb ID	Pell Dsb Amt	Pell Disb Dt	Pell Disb Status	Action Code	Pell YTD Dsb'd
UGRD	900000000389	01	\$2000.00	10/01/2008	Disbursed	A	\$3000.00
UGRD	900000000393	01	\$1000.00	11/01/2008	Disbursed	A	\$3000.00
UGRD	900000000393	02	\$1000.00	06/01/2010	Originated		

Pell Disb/Career page: Disb/Career Detail tab

Career	Displays the code that represents the type of academic work done by the student.
Item Type	Displays the code for the financial aid item type
Pell Dsb Amt (Pell disbursement amount)	Displays the amount of the disbursement.
Pell Disb Status (Pell disbursement status)	Displays the Pell disbursement status based on the origination, disbursement, or any other outbound process. Values are: <i>Originated</i> , <i>Disbursed</i> , and <i>Transmitted</i> .

Action Code Displays the action code, which indicates an action to be taken. The action code value is a result of the acknowledgment record. Values are:

A: Accepted, all fields accepted.

C: Corrected, one or more fields corrected.

D: Duplicate.

E: Rejected, record was rejected.

Pell YTD Dsbd (Pell year-to-date disbursed) Displays the total year-to-date number of disbursements received and accepted by your institution.

Other Information

Select the Other Information tab.

Pell Origination Pell Disbursement **Pell Disb/Career**

Mocny, Harry ID: FAPLL0013

Aid Year: 2010 Financial Aid Year 2009 - 2010 Institution: PSUNV

Pell Origination ID: 606690013LE201000131500

[Customize](#) | [Find](#) | [View All](#) | First 1-3 of 3 Last

[Disb/ Career Detail](#) **Other Information**

Career	Item Type	Disb ID	RFMS Dsb Seq		
UGRD	900000000389	01	2	Disbursement Detail	Ed Flags
UGRD	900000000393	01	1	Disbursement Detail	Ed Flags
UGRD	900000000393	02		Disbursement Detail	

Pell Disb/Career page: Other Information tab

Item Type Displays the code for the financial aid type.

Disb ID(disbursement ID) Indicates the ID number assigned to the disbursement record.

Disbursement Detail If available, click to view Pell disbursement action detail such as the origination ID, disbursement amount, date of the action, and batch number.

Ed Flags (education flags) If available, click to view the education use flags from the inbound record. These are set to inform you of modifications that were made to your database. Education use flags are also activated when the record is rejected, and they require immediate action.

See Also

Chapter 46, "Using Common Origination and Disbursement," Reviewing COD Data, page 1753

Selecting Pell Data Request Types

This section provides an overview of Pell data requests and discusses how to select data requests.

Understanding Pell Data Requests

Use the data request record to request multiple reporting, statement of account, year-to-date information, and reconciliation. You can also use the data request record to receive multiple reporting information concerning students for whom you originate awards and who might also have awards originated at other institutions.

After you select the type of data request and run the process, the process for sending this data is the same as for selecting, viewing, and generating other outbound files.

Pages Used to Select Pell Data Request Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Data Request	PELL_DATA_REQUEST	Financial Aid, File Management, Pell Grants, Create Pell Data Request, Pell Data Request	Select the type of data request that you want.
By Institution	PELL_DATA_INST_SEC	Click the Institution button on the Pell Data Request page.	Request multiple reporting from other institutions.
Year to Date Request IDs	PELL_DATA_ORIG_SEC	Click the YTD Request ID button on the Pell Data Request page.	List students for whom to review year-to-date data.
By Student	PELL_DATA_STDT_SEC	Click the Student button on the Pell Data Request page.	Request multiple reporting by student.

Selecting Data Requests

Access the Pell Data Request page (Financial Aid, File Management, Pell Grants, Create Pell Data Request, Pell Data Request).

Pell Data Request			Aid Year:	2008
Academic Institution:	PSUNV	PeopleSoft University	<input type="button" value="Reset"/>	
Pell ID Reporting:	001315	UNIVERSITY OF CALIFORNIA (UCLA		
Attended Pell ID:	001315	UNIVERSITY OF CALIFORNIA (UCLA		

Pell Data Request Type		Find View All	First	1 of 1	Last
Request Seq:	1	Request Type:	Multiple Reporting		
Multiple Report Request Code 1:	Disbursed Records				
Multiple Report Request Code 2:	Selected Students				
<input type="button" value="Institution"/>		<input type="button" value="YTD Request ID"/>		<input type="button" value="Student"/>	

Pell Data Request page

Request Type

Select the request type. Values are:

Multiple Reporting: Select for multiple reporting information.

Reconciliation Request: Select for reconciliation information.

Statement of Account: Select to receive your funding levels and transactions with GAPS.

Year-to-Date: Select to receive a summary of how many originations and disbursements were sent out and how many rejections and message codes you received based on year-to-date.

You can run multiple requests. Insert a row for the next request and select the type. Each record consists of one request with a header and a trailer.

Multiple Report Request Code 1

Select *Disbursed Records* or *Originated Records*. For example, to determine whether a student or all of your students are conflicting with other schools, you can base the request on disbursements to see if another school has disbursed to a student.

Multiple Report Request Code 2

Select *All Students*, *Selected Institution*, or *Selected Students*. To determine whether a student or all of your students are conflicting with other schools, you can base the request on disbursements to see if another school has disbursed aid to a student.

Reset

Click to refresh the page and to display the Multiple Report Request Code 1 and Multiple Report Request Code 2 fields.

Institution, YTD

Request ID (year-to-date request ID), and **Student**

These fields are available depending on the criteria that you set in the Request Type, Multiple Report Request Code 1, and Multiple Report Request 2 fields. For example, if you select *Multiple Reporting* as the request type, *Disbursed Records* or *Originated Records* as the multiple report request code 1, and *Selected Students* as the multiple report request code 2, then the Student field is available. If you select *Selected Institution* as the multiple report request code 2, then the Institution field is available. If you select *Year-to-Date* as the request type, then the YTD Request ID field is available.

Click Institution to request multiple reporting from other institutions. You can select the institution for which you are requesting data.

Click YTD Request ID to list students for whom you want year-to-date data.

Click Student to request multiple reporting by student.

Sending Pell Data Requests

The process for sending Pell data requests is the same as for Phase-In origination and disbursement.

This section discusses how to send Pell data requests.

See Also

[Chapter 38, "Processing Pell Payments," Sending Pell Payment Records for Phase-In, page 1521](#)

[Chapter 38, "Processing Pell Payments," Understanding Sending Pell Records for Phase-In, page 1521](#)

Pages Used to Send Pell Data Requests

Page Name	Definition Name	Navigation	Usage
Pell Out	RUNCTL_PELLOUT0	Financial Aid, File Management, Pell Grants, Generate Pell Phase-In Data, Pell Out	Create and populate request for data in the outbound staging table.
FA Outbound	RUNCTL_FA_OUT	Financial Aid, File Management, Create Federal Data Files, FA Outbound	Generate outbound files.

Sending Pell Data Requests

Access the Pell Out page (Financial Aid, File Management, Pell Grants, Generate Pell Phase-In Data, Pell Out).

See Also

Chapter 38, "Processing Pell Payments," Selecting Pell Outbound Files, page 1522

Verifying Outbound Pell Data Requests

You can review data in the staging tables for Pell data requests and make corrections before sending these records.

This section discusses how to review Pell data requests.

Pages Used to Verify Outbound Pell Data Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Header	PELL_HEADER_00	Financial Aid, File Management, Pell Grants, View Pell Data Request, Pell Header	View Pell data requests.
Pell Data Request	PELL_DREQ_00	Financial Aid, File Management, Pell Grants, View Pell Data Request, Pell Data Request	Review Pell data requests.
Pell Trailer	PELL_TRAILER_00	Financial Aid, File Management, Pell Grants, View Pell Data Request, Pell Trailer	View the data that is reported and accepted from the inbound batch.

Reviewing Pell Data Requests

Access the Pell Data Request page (Financial Aid, File Management, Pell Grants, View Pell Data Request, Pell Data Request).

Pell Header		Pell Institution Data		Pell Data Request		Pell Trailer	
EC Transaction ID:	PGRQ08IN	Pell Data Request 07/08					
EC Queue Instance:	2	Inbound / Outbound Switch:				0	
<div>Pell Request Info</div> <div>Find View All First 1 of 3 Last</div>							
Request Seq:	1	Pell ID Reporting:	001315				
Request Type:	Multiple Reporting	Attended Pell ID:	001315				
Pell Origination ID:		Pell Media Type:	E				
Multiple Report Request Code 1:	Originated Records	Program Type:	PL				
Multiple Report Request Code 2:	All Students						
MRR Student ID:	Student Demo Information						
MRR Institution Pell ID:							
Action Code:	Comments						

Pell Data Request page

Request Seq (request sequence)	Displays the number of times that the data request was run.
Request Type	Displays a code identifying the type of request. Values are: <i>Multiple reporting</i> <i>Statement of account</i> <i>Year-to-date</i> <i>Reconciliation</i>
Multiple Report Request Code 1	Indicates whether the institution is requesting originated or disbursed institutions. Values are: <i>Originated Records</i> or <i>Disbursed Records</i> .
Multiple Report Request Code 2	Indicates whether the institution is requesting by selected student, selected institution, or all students. Values are: <i>All Students</i> , <i>Selected Students</i> , and <i>Selected Institutions</i> .
MRR Student ID (multiple reporting record student ID)	Displays the student's social security number and name code for which a multiple report is requested.
MRR Institution Pell ID (multiple reporting record institution Pell ID)	Displays the code for which multiple report listings are requested.
Pell ID Reporting	Displays the ID of the reporting institution.
Attended Pell ID	Displays the attending campus ID code assigned to your institution by the Department of Education.

Pell Media Type	Displays the code for the type of tape to use when sending output data. This is available for aid years prior to 2001. <i>E</i> : Send output by electronic file
Student Demo Information	Click to view the student's first name, last name, middle initial, date of birth, and social security number.
Comments	Click to view the message codes on the Pell Data Request Comment page.

Loading Pell Data Requests

The process for receiving Pell data requests is the same as for Phase-In origination and disbursement.

See Also

[Chapter 38, "Processing Pell Payments," Receiving Pell Records for Phase-In, page 1524](#)

Verifying Inbound Pell Data Requests

COD sends report files based on the data request files submitted by the institution for Multiple Reporting, Statement of Account, Year-To-Date and Reconciliation. Use the FA Inbound process (RUNCTL_FA_INBOUND) to load these files into their respective staging tables. The FA Inbound process determines the type of file based on the content of the Batch ID field in the header. Importing the Multiple Report Request requires running Import Pell Phase-In Data (RNCTL_PELLIN0) for load completion. Use the provided inquiry pages to view the file data. Use the search record for these pages to search by EC Transaction ID, where the values match the file message classes. The field value is derived from the Batch ID by the FA Inbound process and is not intended to match the name of the physical file.

After you request origination, disbursement, multiple reporting, statement of account, or year-to-date acknowledgment files, you can view the data received before loading the files to the database.

For detailed information about inbound data from COD:

See *COD Technical Reference*

Pages Used to Verify Inbound Pell Data Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Header	PELL_HEADER_00	<ul style="list-style-type: none"> Financial Aid, Pell Payment, Cash Management Reports, Review Statement of Account, Pell Header Financial Aid, Pell Payment, Multiple Reporting, Review MRR, Pell Header Financial Aid, Pell Payment, Cash Management Reports, Review Reconciliation, Pell Header Financial Aid, Pell Payment, Year to Date Reports, Review YTD Records, Pell Header 	View the values from the inbound process.
Pell Statement of Acct Summ (Pell statement of account summary)	PELL_SAR_00	Financial Aid, Pell Payment, Cash Management Reports, Review Statement of Account, Pell Statement of Acct Summ	Review statement of account summary and GAPS information.
Pell Statement of Acct Detail (Pell statement of account detail)	PELL_SARD_00	Financial Aid, Pell Payment, Cash Management Reports, Review Statement of Account, Pell Statement of Acct Detail	Review statement of account detail, including data about adjustment amount, report date, process date, batch number, and adjustment description.
Pell Multiple Report	PELL_MRR_00	Financial Aid, Pell Payment, Multiple Reporting, Review MRR, Pell Multiple Report	Review multiple reporting data for students for whom you originate awards and who might also have awards originated at other institutions.
Pell MRR Institution Info	PELL_MRR_00_INST	Financial Aid, Pell Payment, Multiple Reporting, Review MRR, Pell MRR Institution Info	View demographic and financial aid administrator data.

Page Name	Definition Name	Navigation	Usage
Pell YTD Originations (Pell year-to-date originations)	PELL_YTDORG_00	Financial Aid, Pell Payment, Year to Date Report, Review YTD Records, Pell YTD Originations	Review Pell year-to-date originations.
Student Demo Information	PELL_STDT_YTD_SEC	Click the Student Demo Information link on the Pell YTD Originations page.	View the student's name, date of birth, and SSN.
Estimated Disbursement Dates	PELL_YTDORG_00_SEC	Click the Estimated Disbursement link on the Pell YTD Originations page.	View approximate disbursement dates.
Pell YTD Disbursements (Pell year-to-date disbursements)	PELL_YTDSB_00	Financial Aid, Pell Payment, Year to Date Reports, Review YTD Records, Pell YTD Disbursements	Review Pell year-to-date disbursements.
Pell YTD Summary (Pell year-to-date summary)	PELL_YTDSUM_00	Financial Aid, Pell Payment, Year to Date Reports, Review YTD Records, Pell YTD Summary	Review Pell year-to-date summary of originations and disbursements.
Comment Code	PELL_YTDSUM_00_SEC	Click the Comment Codes link on the Pell YTD Summary page.	View the number of times that a comment code was returned to your institution on an acknowledgment.
Pell Reconciliation	PELL_RECON_00	Financial Aid, Pell Payment, Cash Management Reports, Review Reconciliation, Pell Reconciliation	Review Pell reconciliation records. Reconcile the total disbursement amount per student.

Page Name	Definition Name	Navigation	Usage
Pell Trailer	PELL_TRAILER_00	<ul style="list-style-type: none"> Financial Aid, Pell Payment, Cash Management Reports, Pell Statement of Acct, Pell Trailer Financial Aid, Pell Payment, Multiple Reporting, Review MRR, Pell Trailer Financial Aid, Pell Payment, Cash Management Reports, Review Reconciliation, Pell Trailer Financial Aid, Pell Payment, Year to Date Reports, Review YTD Records, Pell Trailer 	View inbound data.

Tracking Requests for Funds From GAPS

This section discusses how to:

- Review requests for funds from GAPS.
- Manage item type detail.
- Enter cash transaction notes.

Pages Used to Track Requests for Funds From GAPS

Page Name	Definition Name	Navigation	Usage
Pell Cash Summary	PROG_CASH_SUMM_PG	Financial Aid, Pell Payment, Cash Management Reports, Cash Summary, Pell Cash Summary	Track requests for funds from GAPS. Enter applicable cash management detail.
Item Type	PRG_CSH_ITM_PG_SEC	Click the Item Type button on the Pell Cash Summary page.	Manage item type detail. Enter specific item type information for this cash summary. This enables you to divide each cash summary into the item types for which it is associated.

Page Name	Definition Name	Navigation	Usage
Cash Transaction Notes	PROG_CSH_NT_PG_SEC	Click the Cash Txn Notes button on the Pell Cash Summary page.	Enter cash transaction notes specific to this cash summary detail.

Reviewing Requests for Funds From GAPS

Access the Pell Cash Summary page (Financial Aid, Pell Payment, Cash Management Reports, Cash Summary, Pell Cash Summary).

Pell Cash Summary			
Pell Cash Summary			
Institution:	PeopleSoft University	Aid Year	2008 Financial Aid Year 2007 - 2008
Program:	Pell Grant		
Recon Period:	PERIOD 1 Period 1	Start Date:	09/01/2008 End Date: 12/31/2008
Total Nbr of Records in Period:	50	Total Cash:	\$10,000.00
Total of all Transactions:	\$25,000.00	Tot Antic Disb:	\$500,000.00
		Total Requested Amount:	\$500,000.00
Cash Summary Find First 1 of 1 Last			
'Seq:	1	Tot # Recs:	50
Pell Batch ID:	#A20080016161999052	Conf Cd:	GAPS123
Antic Disb:	\$500,000.00	Batch Dt:	11/05/2008 31
Rqstd Amt:	\$500,000.00	Recon Cash on Hand:	\$10,000.00
Txn Amt:	\$25,000.00	Request Date:	11/01/2008 31
		Txn Date:	11/01/2008 31
		Item Type	
		Cash Transaction Notes	

Pell Cash Summary page

Total Nbr of Records in Period (total number of records in period) Displays the total number of cash summary detail records included in this reconciliation period.

Total of all Transactions Displays the total of all the transaction amounts for this reconciliation period for each cash summary detail record.

Total Cash Displays the total of all cash on hand amounts for this reconciliation period for each cash summary detail record.

Tot Antic Disb (total anticipated disbursement) Displays the total of all anticipated disbursement amounts for this reconciliation period for each cash summary detail record.

Total Requested Amount Displays the total of all requested amounts for this reconciliation period for each cash summary detail record.

Cash Summary

Seq (sequence)	Displays a number that increases each time that you insert a new row. The sequence counts each cash summary detail record in this reconciliation period.
Tot # Recs (total number records)	Indicates the total number of records in the reconciliation period. You can change this number to correct a mismatch with the data.
Conf Cd (confirmation code)	Displays the confirmation code for this cash drawdown request, which is received from GAPS.
Pell Batch ID	Displays the batch ID associated with this cash summary detail.
Batch Dt (batch date)	Displays the date on which the batch was created. This is recorded when you run outbound disbursements.
Antic Disb (anticipated disbursement)	Displays the amount that you anticipate to disburse to students for Pell Grants during the reconciliation period.
Recon Cash on Hand	Displays the amount of cash that you have on hand.
Rqstd Amt (requested amount)	Displays the amount of money that you requested for this disbursement period. The requested amount typically equals the anticipated disbursement minus your cash on hand.
Request Date	Displays the date on which you request the amount.
Txn Amt (transaction amount)	Displays the amount of the transaction for this request.
Txn Date (transaction date)	Displays the date on which this cash summary detail occurred.
Item Type	Click to enter specific item type information for this cash summary. You can divide each cash summary into the item types with which it is associated.
Cash Transaction Notes	Click to enter comments specific to this cash summary detail.

Managing Item Type Detail

Access the Item Type page (click the Item Type button on the Pell Cash Summary page).

Item Type

Pell Batch ID: #A20080016161999052

Recon Batch Date: 11/05/2008

Txn Amt: \$25,000.00

Recon Transaction Date: 11/01/2008

Item Type

Find | View All

First 1 of 1 Last

'Item Type:

9000000000370

Pell Grant - Qtr

Tot # Recs:

User: PS

Cash Action Datetime: 10/29/2008 12:44PM

Request Date

Csh onHnd

Antic Disb

Recon Requested Amount

\$0.00

\$0.00

\$0.00

Item Type page

Select an item type. Edit the other fields as needed. The system updates the User and Cash Action Datetime (cash action date and time) fields when you insert a new row.

Entering Cash Transaction Notes

Access the Cash Transaction Notes page (click the Cash Txn Notes button on the Pell Cash Summary page).

Cash Transaction Notes

Pell Batch ID: #A20080016161999052

Recon Batch Date: 11/05/2008

Txn Amt: \$25,000.00

Recon Transaction Date: 11/01/2008

Cash Transaction Notes

Find

First 1 of 1 Last

'Note Seq:

1

User: PS

Cash Action Datetime: 10/29/2008 12:44PM

Note Text:

Cash Transaction Notes page

Note Seq (note sequence) Displays a number that increases each time that you add a row for a new note. The system updates the User and Cash Action Datetime (cash action date and time) fields when you insert a new row.

Note Text

Enter comments about the requests that you made. For example, you can enter a notation about sending a memo to the main accounting office requesting an electronic funds transfer.

Sending Pell Payment Records for Phase-In

This section provides an overview of sending Pell records for phase-in and discusses how to:

- Select Pell outbound files.
- Generate Pell outbound files.

See Also

Chapter 46, "Using Common Origination and Disbursement," Creating COD Files, page 1748

Understanding Sending Pell Records for Phase-In

Pell Phase-In functionality has been retained to allow outbound and inbound transmissions for reconciling phase-in payment transactions. The process of sending Pell records for phase-in is the same for origination, disbursement, and Pell data requests.

Sending files for phase-in is a two-step process. The first step is to run a process that moves your outbound files to the Application Engine staging tables. The second step is a process that creates a flat file from the data in the staging tables. When the data is in the staging tables, you can verify the data. After you are satisfied with the data for the flat file, you can transmit it. This process moves the data from the staging tables to the Pell Grant Record Layout Format using Application Engine.

The FA_OUTBOUND Application Engine process replaces EDI Manager to generate files for transmission. The FA_OUTBOUND process selects records in the outbound staging tables and generates files ready for transmission. If the system generates multiple files of the same message class at one time, the system increments the file name extension to ensure that file names are unique. If previously generated files of the same message class exist in the output directory, the process ensures that those files are not overwritten.

Pages Used to Send Pell Payment Records for Phase-In

Page Name	Definition Name	Navigation	Usage
Pell Out	RUNCTL_PELLOUT0	Financial Aid, File Management, Pell Grants, Generate Pell Phase-In Data, Pell Out	Select Pell outbound files. Send Pell origination records, disbursement records, or Pell data requests to the outbound staging tables.

Page Name	Definition Name	Navigation	Usage
FA Outbound	RUNCTL_FA_OUT	Financial Aid, File Management, Create Federal Data Files, FA Outbound	Generate Pell outbound files. Run the process that retrieves the records in Pell outbound staging tables and builds a flat file for transmission.

Selecting Pell Outbound Files

Access the Pell Out page (Financial Aid, File Management, Pell Grants, Generate Pell Phase-In Data, Pell Out).

Pell Out

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

Selection Criteria

*Institution:

PSUNV

*Aid Year:

2005

*Pell ID:

001315

☐ Send Disb if Verification 'W'

☐ Pell Origination Outbound

☐ Pell Disbursement Outbound

☒ Pell Data Request Outbound

Pell Out page

Pell ID Select the institution ID.

Send Disb if Verification "W" (send disbursement if verification without documentation) Select to send the disbursement if the verification status code is *W* (without documentation). This value is used only for disbursement.

Pell Origination Outbound Select to move the Pell origination outbound records to the staging tables where the flat files are created.

Pell Disbursement Outbound Select to move the Pell disbursement outbound records to the staging tables where the flat files are created.

Pell Data Request Outbound Select to move Pell data request records to the staging tables where the flat files are created.

Save the page. Then click the Run button, which initiates the Pell Outbound Driver process (FAPP0DRO) to move the selected files from the database to the staging tables.

After you select the institution, aid year, Pell ID reporting number, and one of the check boxes, and then run the Pell Outbound Driver process, the system selects students whose Pell Grant is accepted and identified as ready. The system sets the Pell processing status to reported and the Pell transaction status to transmitted.

Generating Pell Outbound Files

Access the FA Outbound page (Financial Aid, File Management, Create Federal Data Files, FA Outbound).

FA Outbound

Run Control ID: ORIG_05

[Report Manager](#) [Process Monitor](#)

Run

*Outbound File Path:

*Outbound File Type:

PELL Origination

*Aid Year:

2005

*Institution:

PSUNV

FA Outbound page

- Outbound File Path

Enter the path where the file is to be stored.
- Aid Year

Select the aid year for which to run the process.
- Institution

Select the institution for which to run the process.

Verifying Outbound Payment Data

You can review data in the staging tables for origination, disbursement, institution data requests, and Pell data requests and make corrections before sending these records.

See Also

[Chapter 46, "Using Common Origination and Disbursement," page 1747](#)

Receiving Pell Records for Phase-In

The process for receiving Pell records is the same for origination, disbursement, and Pell data requests.

Loading and Moving Pell Acknowledgment Data

The FA_INBOUND Application Engine process automatically determines the type of file and loads the file into the inbound staging tables.

This section discusses how to:

- Load Pell acknowledgment files for phase-in.
- Move Pell acknowledgment data to the database.

See Also

Chapter 46, "Using Common Origination and Disbursement," Loading a COD XML File, page 1772

Pages Used to Load and Move Pell Acknowledgment Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load inbound files from the Department of Education.
Pell Process In	RUNCTL_PELLIN0	Financial Aid, File Management, Pell Grants, Import Pell Phase-In Data, Pell Process In	Move data from the staging tables to the database.

Loading Pell Acknowledgment Files for Phase-In

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files, FA Inbound).

FA Inbound	
Run Control ID: PELL	Report Manager Process Monitor <input type="button" value="Run"/>
Run Option:	<input checked="" type="radio"/> Single File <input type="radio"/> File List
Inbound File:	\\WJONES2102803\data\Pell.txt

FA Inbound page

The system provides two run options on the FA Inbound page: Single File and File List.

Run Option

Select one of the following run options:

Single File: The FA Inbound process expects the file listed in the Inbound File field to be one of the supported EDI files.

File List: The FA Inbound process expects the file listed in the Inbound File field to be a list of files to be processed.

The default option is Single File.

The file list contains the data path and name of the file to be processed. For example, the file list file LIST1.TXT might contain the following files to be processed:

```
\\JSERVER1\2003\SARA03OP.001
\\FILESERV\2003\SARA03OP.002
C:\ISIR\2004\SARA04OP.001
D:\PELL\2003\PGOA03OP.001
\\DLSERVER\INBOUND\2003\DIPA03OP.001
```

Describing the FA EC File Inbound Process

If the system processes a file list, the FA Inbound reads the file list and searches for the listed files using the path defined in the file list. When the system processes the file list, it creates a new file in the same directory as the original file. The new file has the name of the file list with an appended date/time stamp. For example, if LIST1.TXT were processed September 1, at 9 A.M., the new file would be called LIST1.TXT20020901090000.

This new file lists the files that were processed during that run of the FA_INBOUND process. If a problem occurs with any of the files in the file list, the file indicates all files that were successfully processed and the file that generated the error. The error file is always the last row and has the message *Error not processed* appended to the file path. You can use the message log to view the specific error reason. If, for example, the system processed LIST1.TXT, but a problem occurred with the SARA04OP.001 file, the LIST1.TXT20020901090000 file would appear like the following example:

```
\\JSERVER1\2003\SARAOP03.001
\\FILESERV\2003\SARAOP03.002
```

Error not processed: C:\ISIR\2004\SARA04OP.001

Note. The remaining two files defined in the file list were not processed.

You can use the message log to view the files that the system loaded successfully or unsuccessfully. The system displays specific error messages in the log. Use the File/Log Viewer to read these messages.

If a problem occurs with a file in the list file, the FA Inbound process stops processing. The system loads the files that were processed before the error occurred into the database. All subsequent files in the file list are not processed. You can verify whether all files in a file list were successfully processed by opening the date-stamped list file and verifying that the last row in the file does not read, *Error not processed*.

Note. If a problem occurs with the load process, the system might still display the run status in the Process Monitor for the FA_INBOUND process as Success.

Review the message log for any errors that occurred and verify the files that were not processed.

Moving Pell Acknowledgment Data to the Database

Access the Pell Process In page (Financial Aid, File Management, Pell Grants, Import Pell Phase-In Data, Pell Process In).

Pell Process In

Run Control ID: 1

Report ManagerProcess MonitorRun

Report Request Parameters

☒ Pell Origination Acknowledgmnt

☐ Pell Disbursement Acknowledgmt

☐ Pell Multiple Reporting Record

Pell Process In page

Use this page to run the Pell Inbound Driver COBOL SQL process (FAPPIDRO).

- Pell Origination Acknowledgmnt** (Pell origination acknowledgment)

Select to move the Pell origination acknowledgment files from the staging tables to the database.

Pell Disbursement Acknowledgmt (Pell disbursement acknowledgment)

Select to move the Pell disbursement acknowledgment files from the staging tables to the database.

Pell Multiple Reporting Record Select to inbound any MRRs previously requested by more than one institution for the same student.

Verifying Inbound Payment Data for Phase-In

After you request origination, disbursement, or multiple reporting, you can review the data before loading the files to the database.

This section discusses how to:

- Review Pell origination acknowledgments.
- Review Pell disbursement acknowledgments.

Pages Used to Verify Inbound Payment Data for Phase-In

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pell Header	PELL_HEADER_00	Financial Aid, File Management, Pell Grants, View Pell Phase-In Inbound, Pell Header	View the values from the inbound EC Agent process.
Pell Origination Ack (Pell origination acknowledgment)	PELL_ORGACK_00	Financial Aid, File Management, Pell Grants, View Pell Phase-In Inbound, Pell Origination Ack	Review Pell origination acknowledgment data. The system displays the action code of the record as accepted, corrected, duplicate, or rejected.
Pell Orig Acknowledge Dtl Sec (Pell origination acknowledgment detail secondary)	PELL_ORACK_DTL_SEC	Click the Pell Orig Ack Detail link on the Pell Origination Ack page.	View rejected or corrected items.
Student Demo Information	PELL_STDT_OA_SEC	Click the Student Demo Information link on the Pell Origination Ack page.	View date of birth and name.
Pell Orig Ack Message Sec (Pell origination acknowledgment message secondary)	PELL_ORACK_MSG_SEC	Click the Acknowledge Message Code link on the Pell Orig Acknowledge Dtl page.	View messages.
Pell Orig Ack Disb Date Sec (Pell origination acknowledgment disbursement data secondary)	PELL_ORACK_EST_SEC	Click the Estimated Disbursement Date link on the Pell Orig Ack Detail Sec page.	View estimated disbursement dates.

Page Name	Definition Name	Navigation	Usage
Pell Disbursement Ack (Pell disbursement acknowledgment)	PELL_DISBACK_00	Financial Aid, File Management, Pell Grants, View Pell Phase-In inbound, Pell Disbursement Ack	Review Pell disbursement acknowledgment records. This data represents the results of edits and corrections.
Pell Trailer	PELL_TRAILER_00	Administer Financial Aid, Process Pell Payment, Inquire, Pell Student Inbound, Pell Trailer	View inbound data.

Reviewing Pell Origination Acknowledgments

Access the Pell Origination Ack page (Financial Aid, File Management, Pell Grants, View Pell Phase-In Inbound, Pell Origination Ack).

Pell Header	Pell Origination Ack	Pell Disbursement Ack	Pell Special Disbursement Ack	Pell Trailer
EC Transaction ID: PGDA040P		Pell Disb Ackn 03/04		
EC Queue Instance: 1		Inbound / Outbound Switch: I		
Acknowledgment Info Find View All First 1 of 1 Last				
Pell Origination ID:		Pell Orig Seq #:		
ID:		Original SSN:	Original Name Code:	
Pell Attend ID:		Action Code:	Low T & F Cd:	
Awd Amt:		Enrlmnt Dt:	Incarcerated Code:	
Verif Stat:		ISIR Txn Nbr:	Academic Calendar:	
Pell EFC:		Sec EFC Cd:	Payment Methodology:	
COA:		Enroll Stat:	Hrs Pay Period:	
Weeks Calc:		Sched Pell:	Prev ISIR Txn:	
Weeks Acad Yr:		Hrs Acad Yr:	Prev Sec EFC Cd:	
Prev EFC:		Prev COA:		
Pell Orig Ack Detail		Student Demo Information	Nbr Pay Per:	

Pell Origination Ack page

Pell Orig Ack Detail Click to view rejected or corrected items.
(Pell origination acknowledgment detail)

Student Demo Information Click to view the student's first name, last name, middle initial, date of birth, and social security number.

See Also

Chapter 38, "Processing Pell Payments," Reviewing Results of Pell Origination, page 1492

Reviewing Pell Disbursement Acknowledgments

Access the Pell Disbursement Ack page (Financial Aid, File Management, Pell Grants, View Pell Phase-In inbound, Pell Disbursement Ack).

Pell HeaderPell Origination AckPell Disbursement AckPell Special Disbursement AckPell Trailer

EC Transaction ID:PGDA040PPell Disb Ackn 03/04

EC Queue Instance:1Inbound / Outbound Switch:|

Inbound Pell DisbursementFind | View AllFirst1 of 5Last

Pell Origination ID:	589600713ST200400131500	Pell Orig Seq #:	1	Ed Use Flag 1:	1
ID:	FA0860	Disb Reference Nbr:	01	Ed Use Flag 2:	1
Disbursement Date:	20030301	Pay Period Start Dt:		Ed Use Flag 3:	1
Action Code:	A	Process Instance:	291	Ed Use Flag 4:	1
Disbursement Amount:	0125000	Pell Trans Date/Time:	09/20/04 11:38:46AM	Ed Use Flag 5:	0
Db/Cr Ind:	P	Processing Status:	P	Ed Use Flag 6:	0
YTD Dsb Amt:	0350000			Ed Use Flag 7:	0
				Ed Use Flag 8:	0
				Ed Use Flag 9:	0
				Ed Use Flag 10:	0

[Acknowledgement Message Codes](#)

Pell Disbursement Ack page

YTD Dsb Amt (year-to-date disbursement amount)	Displays the year-to-date total amount disbursed to the student for the award year.
Pell Orig Seq # (Pell origination sequence number)	Identifies the origination sequence for the disbursement acknowledgment.
Process Instance	Displays the occurrence number assigned by the inbound acknowledgment process.
Pell Trans Date/Time (Pell transaction date and time)	Displays the date and time that the system generated the Pell transaction.

Processing Status	Displays the acknowledgment processing status. Values are: <i>P</i> : Processed <i>N</i> : Not processed <i>E</i> : Error
Ed Use Flag (education use flag)	Click to view education use flags 1-10. These are set to notify you of modifications that have been made to your database. The system uses education use flags when the acknowledgment is rejected. These flags require immediate action.
Acknowledgement Message Codes	Click to view disbursement acknowledgment message codes 1-25.

See Also

Chapter 38, "Processing Pell Payments," Reviewing Results of Pell Origination, page 1492

Chapter 39

Processing ACG and SMART Grants

The Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (SMART) award functionality is part of several processes, including Financial Aid Term, Eligibility, Packaging, Disbursement, and COD Reporting.

This chapter provides an overview of options for processing ACG and SMART grants, an overview of the Packaging process for ACG and SMART grants, and discusses how to:

- Determine eligibility for ACG and SMART grants.
- Load grant eligibility information from an external file.
- Maintain HERA level values.
- Review transfer work for FA term HERA level determination.
- Package ACG and SMART awards in nonstandard award periods.
- Override an ACG or SMART award through Professional Judgement.
- Repackage Pell, ACG, and SMART grants.
- Originate ACG and SMART grants to Common Origination and Disbursement (COD).
- Disburse ACG and SMART grants.
- Create ACG and SMART COD reports.

See Also

[Chapter 6, "Setting Up ACG and SMART Grants," page 147](#)

[Chapter 15, "Setting Up Disbursement Rules," page 441](#)

[Chapter 25, "Assessing Eligibility for Financial Aid," page 779](#)

[Chapter 46, "Using Common Origination and Disbursement," page 1747](#)

Understanding Options for Processing ACG and SMART Grants

Before implementing ACG and SMART processing, consider the number of grant recipients you have, available staff resources, your expertise in using the Equation Engine to write custom equations, and the timing of your implementation as you design your business process flow.

Although several options are available for accomplishing each business requirement for awarding Higher Education Reconciliation Act (HERA) grants, you must enter eligible students in the grant eligibility record structure to award, disburse, and originate the grants.

This section discusses various options for:

- Identifying grant candidates.
- Verifying eligibility grants.
- Monitoring changes from Ineligible to Eligible.
- Monitoring changes from Eligible to Ineligible.

Identifying Grant Candidates

Consider these options for initial entry into the ACG and SMART Grant Eligibility pages:

Option 1	<p>100 % manual entry into the eligibility page. You do not run the grant selection process.</p> <p>This option is for institutions that have very few grant recipients who can be identified independent of the grant process, such as by query. With this option, the grant process would never be run.</p> <p>Eligible students can also be entered using an external file process. See Business Process II, Verifying Eligibility for Grants, Option 4.</p>
Option 2a	<p>Run selection process to identify candidates and assign HERA academic level and/or CIP code. Students not selected can still be entered manually.</p> <p>This option would benefit institutions that have too many grant candidates to enter manually.</p>
Option 2b	<p>Run selection process to identify candidates. Use custom equations to assign HERA academic level and/or CIP code. Students not selected can still be entered manually.</p> <p>This is similar to 2a, except custom equations are used to assign the HERA academic level and CIP code</p>

Verifying Eligibility Grants

Consider these options for verifying eligibility for ACG and SMART grants:

Option 1	<p>Do not use equation groups to evaluate students. Review all manually. Update eligibility status for all.</p> <p>This option is for institutions that want to review each student manually, such as those who have few grant recipients. An institution that already has a process to determine eligibility would not want to create equations to perform the same evaluation.</p>
Option 2	<p>Use or modify provided equations to perform most evaluations and determine eligibility for some candidates automatically. Manually review the remaining students. Requires the creation and use of equation groups.</p> <p>You can use various delivered equations to perform some eligibility checks, such as FT enrollment, Eligible CIP code, Pell recipient, but not allow equations to set a final eligibility status. To ensure that the equation groups cannot assign a final eligibility status, one equation must set the review flag.</p>

Option 3	Create additional equations to automate the review of most candidates. Review the rest manually. Requires the creation and use of equation groups. Requires extensive equation development to perform grant evaluations based on how the institution collects eligibility information. The main benefit is that the majority of eligibility decisions can be made automatically.
Option 4	Load eligibility information from an external data file. institutions that currently keep track of their students' eligibility information externally can load information directly into the eligibility tables by creating and loading an external flat file. The grant process would not need to be run.

Monitoring Changes from Ineligible to Eligible

Consider these options for monitoring changes in eligibility status, from ineligible to eligible:

Option 1	Identify changed statuses through an external method. Update eligibility data manually. This option is for institutions that have small grant populations or do not want to use the grant process to re-evaluate ineligible students using equations.
Option 2	Use the grant process to reprocess ineligible students. This is an option for institutions that already use equations to evaluate their students.

Monitoring Changes from Eligible to Ineligible

Consider these options for monitoring changes in eligibility status from eligible to ineligible:

Option 1	Use disbursement authorization to catch changes in eligibility during disbursement. Use the HERA disbursement rules to verify that the student continues to meet the eligibility requirements for the grant.
Option 2	Run the grant process with the Reprocess Eligible Records run option set on the Evaluate ACG/SMART Eligibility page. institutions should create new equation groups specific for this re-evaluation run. If you manually enter eligible students, you can use the Reprocess Eligible Records run option because it does not add new records to the eligibility tables.

Determining Eligibility for ACG and SMART Grants

This section provides an overview of the grant eligibility review process and discusses how to:

- Evaluate grant eligibility.
- Determine grant eligibility.
- Review and update eligibility information.
- Use the Classification of Instructional Programs (CIP) code for a program, plan, or subplan.
- Reprocess ineligible records.

- Reprocess eligible records.

See Also

Chapter 39, "Processing ACG and SMART Grants," Loading Grant Eligibility Information from an External File, page 1545

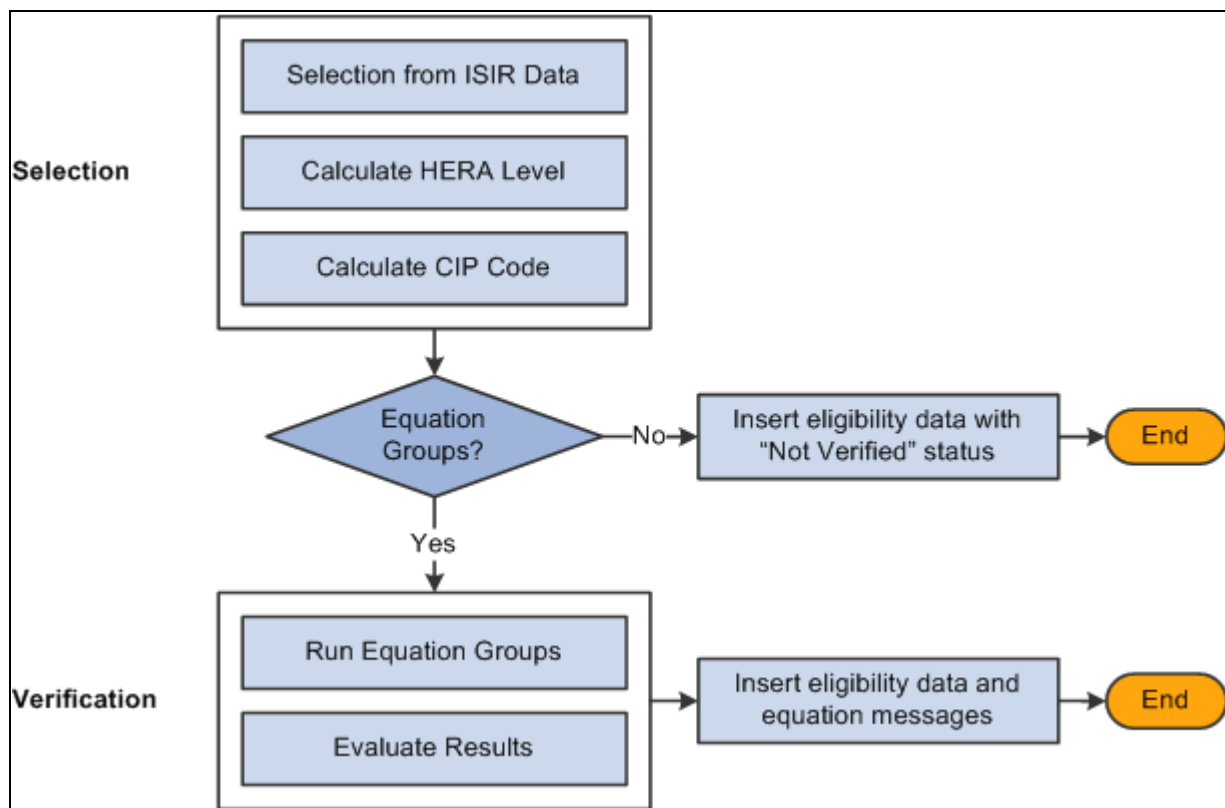
Understanding the Grant Eligibility Review Process

The grant evaluation process identifies potential grant candidates based on their current Institutional Student Information Record (ISIR) information. These records are then evaluated using equations, to determine whether the student meets the eligibility criteria for a grant. Some evaluated records require manual review before final eligibility can be determined.

Because eligibility can change during the aid year, institutions must establish a student's eligibility for each enrolled term. Institutions can reassess a student's eligibility any time during the term to make changes to the student's awards before disbursement processing.

You are not required to use the grant evaluation process. Alternate methods for determining eligibility for ACG and SMART are also discussed in this chapter.

FAPASEQN is the main process used by the grant module. The process has two events, the selection of potential grant candidates and the verification of eligibility for each candidate.



FAPASEQN process

Selection of Grant Candidates

The process identifies potential candidates for ACG and SMART grants based on the student's current ISIR data and these requirements:

- The student must be reported as Pell eligible (Pell Grant Eligibility = Y).
- The student must be reported as a US citizen or eligible non-citizen on the ISIR.

The student's Higher Education Reconciliation Act (HERA) academic level is used to determine the grant type for which the student might be eligible. The HERA academic level is determined in one of these ways:

- Using the beginning of term HERA level calculated by the FA Term process. This is the default.
- Creating an equation to calculate the HERA level.

For SMART grant program participants, selected records with a HERA level of 3, 4, and 5 are evaluated for a Classification of Instructional Program (CIP) code. Depending on your setup, a student's academic program of study is defined at the academic program, academic plan, or academic sub plan levels and the assigned CIP code is determined.

Verification of Grant Candidates

Define your equation groups based on the type of grant for which the student is being considered and their HERA level. A check is performed to determine whether an equation group has been assigned to the student:

- If no equation group has been assigned, the student's grant eligibility information record is created with the information collected up to this point. An eligibility status of *Not Verified* is assigned, because the equation group evaluation has not occurred.
- If an equation group has been assigned, the equations are run to evaluate the students. The eligibility status resulting from the equation can be: *Eligible*, *Eligible, pending review*, *Ineligible*, or *Ineligible, pending review*. The student's grant eligibility information record is created with the information collected up to this point, including the results of each equation.

You can review the resulting information in the ACG/SMART Grant Eligibility component.

Re-running of the Grant Eligibility Review for Previously Selected Students

If a student has been reviewed and information exists in the grant eligibility tables, the process continues to evaluate the student until a final eligibility status (*Eligible*, *Ineligible*, or *Cancelled*) is made for the selected grant type and term. The following updates occur at each evaluation.

Update	Description
HERA Academic Level	<p>The student's HERA academic level must be reviewed for changes each time a student is evaluated to determine which equation group is to be used to determine the student's eligibility:</p> <ul style="list-style-type: none"> • If the level changes to a value that is invalid for the existing grant type, the student is made ineligible for that grant type. For example, if a student was initially identified as an ACG 2 candidate, but subsequently is found to be a level 3, the student is made ineligible for the ACG award. In this case, a new eligibility record for SMART is then created for the student. • If the HERA level override check box is selected, the process does not recalculate the student's level.
CIP Code	<p>Like the HERA level, the student's CIP code is also evaluated if a final eligibility status has not yet been determined. If the CIP code has changed, the student's eligibility records are updated to reflect the change.</p> <p>If the CIP override check box has been set, the process uses the existing CIP code.</p>
Student's Grant Eligibility Records	<p>After these checks are performed, the process continues, as it would for newly selected grant candidates. The process checks for equation groups to verify eligibility and updates the grant eligibility records.</p> <p>Eligibility information already exists for the student:</p> <ul style="list-style-type: none"> • If the process is running with equations, it always adds a new row if the current status for the record is <i>Not Verified</i>, because the status changes from <i>Not Verified</i> to something else. If the status and data remain the same, a new row is not added, but the Equation Engine reasons are refreshed, deleting old messages and inserting new messages. • If the current eligibility status is another value, or if data changes occur, a new eligibility row is inserted so that the changes can be documented.

Pages Used to Determine Eligibility for ACG and SMART Grants

Page Name	Definition Name	Navigation	Usage
Evaluate ACG/SMART Eligibility	SFA_RUN_ASG_SEL	Financial Aid, ACG/SMART Grants, Evaluate ACG/SMART Eligibility	Select and process records for grant eligibility.
ACG/SMART Grant Eligibility	SFA_ASG_ELIG	Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility	Review and update student grant eligibility records.
Comments	SFA_ASG_ELIGCMNT	Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility, Comments	Add free-form comments to the student's grant eligibility record.

Page Name	Definition Name	Navigation	Usage
Select CIP Code	SFA_ASG_CIPSEL_SEC	Click the Select CIP Code link on the ACG/SMART Grant Eligibility page.	Review or select the CIP code for a program, plan, or subplan.
FA Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files	Process the external file used to input students' grant eligibility information.

Evaluating Grant Eligibility

Access the Evaluate ACG/SMART Eligibility page (Financial Aid, ACG/SMART Grants, Evaluate ACG/SMART Eligibility).

Evaluate ACG/SMART Eligibility page

Include Ineligible Records

Select to reprocess records with an eligibility status of *Ineligible*. This occurs in addition to selecting new records and the reprocessing of existing records without a final eligibility determination.

Note. This cannot be run if the Reprocess Eligible Records check box is selected.

Reprocess Eligible Records

Select to reprocess only records with an eligibility status of *Eligible*. No other records are processed. Use this option to perform census-type revaluations of eligible students.

Note. This cannot be run if the Include Ineligible Records check box is selected.

Award Type	<p>Select an award type value that corresponds to a specific grant type and HERA level you use. Values are:</p> <p><i>ACG 1</i> First year ACG (HERA levels 0 and 1)</p> <p><i>ACG 2</i> Second year ACG (HERA level 2).</p> <p><i>SMART 1</i> First year SMART (HERA level 3).</p> <p><i>SMART 2</i> Second year SMART (HERA level 4).</p> <p><i>SMART 3</i> Third year SMART (HERA level 5)</p>
Equation Group	<p>Optional. Select the equation group for each award type that performs the eligibility option. Equation groups are not required to run this process.</p>

Determining Grant Eligibility

The grant eligibility status is determined by the results of the equation executed within the equation groups. Equations used to evaluate eligibility can set a result value of:

- **PASSED.** The conditions the equation tested were met.
- **FAILED.** the conditions the equation tested were not met.
- **UNDETERMINED.** There was not enough information necessary to make a PASSED or FAILED determination.

The process evaluates the results of the equations run against each student and:

- If all equations return a result of PASSED, the student's grant eligibility status is *Eligible*.
- If one or more equations return a result of FAILED, the student's eligibility status is *Ineligible*.
- If one or more equations return a result of UNDETERMINED, and all other equations returned a result of PASSED, the student status is *Eligible Pending Review*.

Using the Review Flag

The review flag is a setting that forces any grant record to be reviewed manually; the grant process does not assign a final eligibility status. When an equation sets the review flag, the student's eligibility status is set to either *Eligible, pending review* or *Ineligible, pending review*.

If equation groups are not assigned for an award type when the grant process is run, the eligibility status does not change because these students are not being evaluated. However, if a student's HERA level has been updated so that they are no longer eligible for the grant type on the eligibility record (for example, the student goes from level 2 to level 3), the record is automatically made ineligible.

For detailed examples of how the eligibility status is determined,

See [Chapter 6, "Setting Up ACG and SMART Grants," Writing and Using Equations for ACG and SMART Eligibility, page 186.](#)

Processing by Term

Because grant eligibility must be evaluated each term, institutions should begin their processing cycle by selecting records for the first term in their aid year. When eligibility has been established for the term, students can be awarded.

The Packaging process can project a student's grant eligibility beyond the current term as long as the student's HERA level does not change from the first term awarded in subsequent terms. Grants can also be originated and transmitted to COD at this point.

Therefore, institutions generally should not reprocess their eligible students for later terms until after the first term has already started, or until a final eligibility status can be calculated for the term.

Reviewing and Updating Eligibility Information

Access the ACG/SMART Grant Eligibility page (Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility).

The screenshot displays the 'ACG/SMART Grant Eligibility' page. At the top, there are tabs for 'ACG/SMART Grant Eligibility' and 'Comments'. Below the tabs, the student's name 'Kerry Locke' is shown, along with their ID 'FAIW0047'. The institution is listed as 'PSUNV' and the aid year as '2008'. The grant type is 'National SMART' and the term is '2008 Spring'. A status date of '09/11/07 11:39:47AM' is also present. The eligibility status is set to 'Eligible', and the HERA Student Level is '3rd Year'. The eligibility reason is 'High School Program'. The CIP Code is '01.0901' and the GPA is '4.000'. The source is 'User' and 'Disbursement Protection' is checked. A table of 'Other Information' links is provided, including 'Financial Aid Status', 'External Education', 'Student Program', 'Term History', 'NSLDS Inquiry', 'Award Summary', 'FA Term', 'Transfer Credit - Manual', and 'HERA Level'. At the bottom, there is a table with columns 'DateTime' and 'Message Text'.

DateTime	Message Text
1	

ACG/SMART Grant Eligibility page

After the grant evaluation process is run, the processed records can be viewed in the ACG/SMART Grant Eligibility pages. Here, you can review the student's status and complete the evaluation of the student's eligibility. You can also enter students manually into the page so that the evaluation process can process the student's eligibility, or the staff can complete the review manually.

All students who are eligible to receive ACG or SMART grants must have eligibility information to award and disburse grant funds to the student, as well as originate and report the student's eligibility information to COD. The current status for the grant type and term in the ACG/SMART grant eligibility component must be *Eligible*, or the authorization fails.

Eligibility Status

Enter the student's current grant eligibility status for the term. Values are:

Canceled: The student should not have been considered a grant candidate. The record is no longer be selected for review for the same grant and term. This setting is entered manually.

Eligible: The student is eligible for the grant.

Eligible, pending review: The student appears to be eligible for the grant, but a manual review is required for a final decision.

Ineligible: The student is not eligible for the grant.

Ineligible, pending review: The student appears to be ineligible for the grant, but a manual review is required for a final decision *Ineligible*. The student is not eligible for the grant.

Not Verified: The student has been entered as a potential grant candidate. Evaluation has not yet been performed. This setting is assigned if the grant evaluation process is run without equation groups assigned.

HERA Student Level
(Higher Education
Reconciliation Act
student level)

Enter the student's HERA academic level. Values are:

1st Year — Never Attended

1st year — Previously Attended

2nd Year

3rd Year

4th Year

5th Year

Grad/Professional — 1st Year

Grad/Professional — Continuing

Note. The *Grad/Professional — 1st Year*, and *Grad/Professional — Continuing* values are invalid for ACG/SMART reporting, but are used to document a student's ineligibility.

Ovrd (override HERA
student level)

Select to prevent the grant selection process from recalculating the student's current HERA level.

Note. This does not prevent an equation defined in an equation group from changing the value unless specifically coded to note the override condition.

Eligibility Reason

Select the reason the student is eligible for ACG. Values are:

AP/IB (advanced placement or international baccalaureate): Student has completed Advanced Placement or International Baccalaureate course work with acceptable scores.

Course: Student has completed the high school course work that satisfies the ACG curriculum requirements.

HS Prog (high school program): Student has completed an eligible high school program accepted by the Department of Education.

High School Programs	Enter when the (ACG) Eligibility Reason is <i>HS Prog.</i>
CIP Code (Classification of Instructional Programs code)	For SMART eligible students, select the qualifying CIP code assigned to the student.
Ovrd (override CIP code)	Select to prevent the grant selection process from recalculating the student's current CIP code.
<hr/> Note. This does not prevent an equation defined in an equation group from changing the value unless specifically coded to note the override condition.	
Select CIP Code	Click this link to access the Select CIP page.
GPA (grade point average)	Enter the student's GPA for the grant record. This value is not set by any delivered processes, but can be set by using equations.
Ovrd (override grade point average)	Currently not used by any delivered process. Equations created to populate the GPA field should be designed to note if the override has been set.
Status Date	Displays the date and time the current eligibility status was set.
Seq Nbr (sequence number)	Displays the sequential counter of the existing eligibility rows.
Source	Indicates who inserted the last record on the page, <i>System</i> or <i>User</i> . If the system, all fields are display only.
Disbursement Protection	Select this check box to indicate to the Packaging module whether previously disbursed grant funds should be reversed for a student who becomes ineligible for the grant for the term. By default, this feature is activated so that previously disbursed funds are not reversed.
Other Information	
Financial Aid Status	Use this link to access a quick view of the student's current overall financial aid status.
External Education	If available, use this link to view any academic transcript information entered in the external history pages. This is useful to determine whether the student meets ACG eligibility criteria.
Student Program	Use this link to view the student's current academic program and plan. This is useful to determine SMART eligibility if there is conflicting FA Term information.
Term History	Use this link to view the student's enrollment history at the institution, including accepted transfer credit. Use this information in determining HERA level GPA.

- NSLDS Inquiry

Use this link to determine whether the student has any previously reported ACG and SMART grant awards.
- Award Summary

Use this link to determine whether ACG or SMART grants have been awarded to the student.
- FA Term

Use this link to review or update the student's FA Term data, including HERA level information.
- Transfer Credit - Manual

Use this link to resolve transfer credit calculation issues. You must have security access to the Transfer Credit – Manual component to see the link.
- HERA Level

Use this link to open a display version of the HERA Academic Level information in the Financial Aid Term component.

Detail Tab

Access the Detail tab on the ACG/SMART Grant Eligibility page.

Messages			
Equation Name		Message Set Number	Message Number
1	FAASINCMPLT	14426	5000
2	FAASCITIZEN	14426	5010
3	FAASPELLELIG	14426	5020
4	FAASCIPELIG	14426	5050
5	FAASTERMGPA	14426	5210

ACG SMART Grant Eligibility page: Details tab

The Detail tab shows the equation name as well as message catalog information.

Using the CIP Code for a Program, Plan, or Subplan

Access the Select CIP Codes page (click the Select CIP Code link on the ACG/SMART Grant Eligibility page).

Select CIP Code page

This page displays the student's academic program, academic plan, and academic subplan from the FA Term record. If a CIP code has been assigned at the program, plan, or sub plan level, it is displayed. Select one of the CIP code links to return to the main page with the selected CIP code now in use. You can also use this page to search for a CIP code by changing any of the edit box values.

Select from Student Records

Select this check box to look up the student's CIP code based on the source tables in Student Records that the FA Term build process uses.

When a student has multiple active programs, plans, or sub-plans, you can view the information and select the value that most accurately determines the student's eligibility for SMART.

When selected, the fields are empty and you can use the search fields to select the student attribute to view any assigned CIP codes for the selected value.

When the grant process is run, changes to any of the student's eligibility information usually result in a new row of eligibility information. This provides an audit trail of changes to the student's eligibility information. A new row is not created when the current row has an eligibility status of *Not Verified* and the grant process does not change the eligibility status, the equation group was not run for the student. Any changes in eligibility data updates the current record.

If the grant process inserts a new row of eligibility information, the Source appears as *System* and the field is in display mode. You must insert a new eligibility row to manipulate any of the field values.

Online Edits

If you set the student to *Eligible*, the following edits occur:

- The HERA academic level must be valid for the grant type.
- For an ACG record, an eligibility reason must be provided. If the eligibility reason is High School Program, you must provide the state program code.
- For a SMART record, the CIP code must be SMART eligible.

Disbursement Protection Edit

If a student has been awarded grant funds, the funds are disbursed for the term, the student's eligibility status is changed to *Ineligible* or *Ineligible, pending review*, and a warning message requests that you determine when disbursement protection should be maintained so that the disbursed amount is not reduced by the Packaging process. By default, the disbursement protection setting is on for all students.

Reprocessing Ineligible Records

By default, the grant evaluation process continuously reprocesses records that do not have final grant eligibility status of *Eligible*, *Ineligible*, or *Canceled*. Records with one of the following statuses are reprocessed until a final status is determined:

- *Not Verified*
- *Eligible, pending review*
- *Ineligible, pending review*

You can use the Include Ineligible Records check box to include records with a final status of *Ineligible* to be reprocessed. This option may be necessary to reevaluate cases where a student was initially ineligible for a grant, but later become eligible based on additional information about the student.

For example, a student might have been ineligible to receive a SMART grant based on the student's major at the time the evaluation process was made. Later in the term, the student changes to an eligible major. If it is the institution's policy to reevaluate this change of eligibility, running the grant eligibility process with this option would reevaluate the student.

If you select the Include Ineligible Records check box on the Evaluate ACG/SMART Eligibility page, the evaluation process follows the same selection and evaluation steps, but includes *Ineligible* status records. Equation groups must be used that include the evaluation rules.

Reprocessing Eligible Records

Eligible students can become ineligible during the term. For example, a student eligible for a SMART grant might change from an eligible major to an ineligible major. A student might be eligible for a grant based on a projected full time load, but during the term, stop maintaining that load. A student's HERA level can change based on recent transfer credit units received. The student's final GPA might not have been determined when the student was awarded a grant.

While these conditions would normally be caught during the disbursement authorization process, institutions can use the Reprocess Eligible Records check box on the Evaluate ACG/SMART Eligibility page to have the grant evaluation process reevaluate eligible student before running the disbursement processes.

If you select the Reprocess Eligible Records check box, only eligible status records are selected and reprocessed. All other records are skipped. New grant candidates are not selected.

Students who have been awarded, but are now found to be ineligible, must be repackaged.

Students who have been awarded, but are now found to be *Ineligible, pending review* or *Eligible, pending review* cannot be disbursed or originated until a final status is determined.

If the student has been disbursed grant funds for the term and is now found to be ineligible, the institution must determine whether the student is able to keep the disbursed funds. The disbursement protection setting on the ACG/SMART Grant Eligibility page controls how the Packaging process treats the award.

Loading Grant Eligibility Information from an External File

Instead of running the grant evaluation process to populate the students' eligibility data, you can import students' grant eligibility information directly to the Grant Eligibility component using an external flat file. If you have very few grant recipients, it would be more efficient to manually enter eligible students.

This section provides the external file layout specifications and discusses how to:

- Generate the list of grant recipients using a Microsoft Excel spreadsheet.
- Process the external file.

External File Layout Specifications

This is the format for the external file. The first row in the file contains ELG HEADER, which uniquely identifies the file to the FA INBOUND process.

Field	Field Length (fixed length)	Attributes
EMPLID	11	The student's EmplID This is a required field.
ELIGIBILITY PAYMENT REASON CODE	2	Reason eligible for ACG. Values are: 01 = High School Program 02 = Advanced Placement/International Baccalaureate Coursework 03 = Coursework Not required for SMART.
RIGOROUS HIGH SCHOOL PROGRAM CODE or ACG STATE PROGRAM CODE	6	Description of a High School Program This field is only required if Eligibility PaymentReasonCode = 01. Not required for SMART.
CIP CODE	7	Qualifying SMART program Not required for ACG.

Field	Field Length (fixed length)	Attributes
ACADEMIC LEVEL	1	Used to populate Student Level Code COD field. Values are: 0 = 1st year, undergraduate/never attended college 1 = 1st year, undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior 5 = 5th year undergraduate/senior For ACG, this value must be 0, 1, or 2. For SMART, this value must be 3, 4 or 5.
INSTITUTION	5	Example: PSUNV. This is a required field.
AID YEAR	4	Example: 2008 This is a required field.
GRANT TYPE	4	ACG or SMART This is a required field.
TERM	4	The term value. For example - 0590 (fall 2007). This is a required field.
ELIGIBILITY STATUS (1)	1	Student's grant eligibility status for the term. Values are: C—Cancelled E—Eligible I—Ineligible N—Not Verified R—Eligible, pending review X—Ineligible, pending review This is a required field.
ACADEMIC LEVEL OVERRIDE	1	Indicates that the HERA academic level has been overridden. Values are Y and blank. Not usually used.

Field	Field Length (fixed length)	Attributes
CIP CODE OVERRIDE	1	Indicates that the CIP code has been overridden from the derived value. Values are Y and blank. Not usually used.
GPA	9 nnnn.nn	The student's GPA captured at the time eligibility is determined.
GPA OVERRIDE	1	Indicates that the GPA has been overridden. Values are Y and blank. Not usually used.

This is an example of an external file.

```

C:\TEMP\deantest1.txt
ELG HEADER
FAASG001 01CA0002 2PSUNV2008ACG 0590E 3.4 Y
FA0600 01CA0001 1PSUNV2008ACG 0590C 03.125
FA0601 02AR0001 2PSUNV2008ACG 0590E 2.075
FA0602 03 40.05013PSUNV2008SMRT 0590E 4.021
FA0603 02 27.01014PSUNV2008SMRT 0590E 2.1

```

External File Example

Generating the List of Grant Recipients Using a Microsoft Excel Spreadsheet

Here is an example of how the external file can be generated if your grant students are maintained in an Excel spreadsheet. You might have a better or easier method for generating the flat file. You can request a copy of the actual Excel file from the Oracle Global Support Center.

Step 1. Create a spreadsheet with the external file fields and enter your eligible students.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	EMPLID	Elig Rsn	Proc Cd	CIP	Ac Level	Institution	Aid Year	Grant Typ	Term	Elig Statu	Ac Lvl Ovr	CIP Cd Ovr	GPA	GPA Ovr
2	12345678901	01	CA0002	14.0901	2	PSUNV	2007	ACG	580	E	Y		3.4	Y
3	FAD0089	01	CA0001		1	PSUNV	2007	ACG	570	C	N		23	
4	FAD0103	02	AR6001		2	PSUNV	2007	ACG	0580	I		Y	12345	Y
5	FAD0125			26.0406	3	PSUNV	2007	SMRT	0570	V		N	12345.678	

All Cells are Formatted as Text

Step 2. Paste this function in cell V2.

```

=CONCATENATE(A2,(REPT("-",11-LEN(A2))),B2,(REPT("-",2-LEN(B2))),C2,(REPT("-",6-LEN(C2))),D2,(REPT("-",7-LEN(D2))),E2,(REPT("-",1-LEN(E2))),F2,(REPT("-",5-LEN(F2))),G2,(REPT("-",4-LEN(G2))),H2,(REPT("-",4-LEN(H2))),I2,(REPT("-",4-LEN(I2))),J2,(REPT("-",1-LEN(J2))),K2,(REPT("-",1-LEN(K2))),L2,(REPT("-",1-LEN(L2))),M2,(REPT("-",9-LEN(M2))),N2,(REPT("-",1-LEN(N2))))

```

Function for cell V2

V2		=CONCATENATE(A2,(REPT("-",11-LEN(A2))),B2,(REPT("-",2-LEN(B2))),C2,(REPT("-",6-LEN(C2))),D2,(REPT("-",7-LEN(D2))),E2,(REPT("-",1-LEN(E2))),F2,(REPT("-",5-LEN(F2))),G2,(REPT("-",4-LEN(G2))),H2,(REPT("-",4-LEN(H2))),I2,(REPT("-",4-LEN(I2))),J2,(REPT("-",1-LEN(J2))),K2,(REPT("-",1-LEN(K2))),L2,(REPT("-",1-LEN(L2))),M2,(REPT("-",9-LEN(M2))),N2,(REPT("-",1-LEN(N2))))									
1	Elig Status	Ac Lvl	Ovr								
2	E	Y		3.4	Y						FAASG001 01CA000214.09012PSUNV2007ACG 580 EY 3.4 Y
3	C	N		23							
4	I		Y	12345	Y						
5	V		N	12345 678							

Spreadsheet with Formula in Cell V2.

Step 3. Paste the function in the remaining rows in column V (except V1).

Copy V2 and use the paste special function for formulas. Enter the formula down the column in every row except V1.



Paste Special page

J	K	L	M	N	O	P	Q	R	S	T	U	V
Elig Status	Ac Lvl	Ovr	CIP Cd	GPA	GPA Ovr							ELG HEADER
E				3.4	Y							FAASG001 01CA0002 2PSUNV2008ACG 0590E 3.4 Y
C				03.125								FA0600 01CA0001 1PSUNV2008ACG 0590C 03.125
E				2.075								FA0601 02AR0001 2PSUNV2008ACG 0590E 2.075
E				4.021								FA0602 03 40.05013PSUNV2008SMRT0590E 4.021
E				2.1								FA0603 02 27.01014PSUNV2008SMRT0590E 2.1

Formula in V Column

Step 4. Copy the column V and paste to new worksheet.

Perform a copy and the Paste Special (values only) to the new worksheet.

A						
1	ELG HEADER					
2	FAASG001	01CA0002	2PSUNV2008ACG	0590E	3.4	Y
3	FA0600	01CA0001	1PSUNV2008ACG	0590C	03.125	
4	FA0601	02AR0001	2PSUNV2008ACG	0590E	2.075	
5	FA0602	03	40.05013PSUNV2008SMRT	0590E	4.021	
6	FA0603	02	27.01014PSUNV2008SMRT	0590E	2.1	
7						

Data in new worksheet

Step 5. Save the new worksheet as Text (MS_DOS)

In response to a message, click OK to save only the active sheet.

In response to a message, click Yes to keep the format and leave out any incompatible features.

Step 6. Verify the output.

C:\TEMP\deantest1.txt						
ELG HEADER						
FAASG001	01CA0002	2PSUNV2008ACG	0590E	3.4	Y	
FA0600	01CA0001	1PSUNV2008ACG	0590C	03.125		
FA0601	02AR0001	2PSUNV2008ACG	0590E	2.075		
FA0602	03	40.05013PSUNV2008SMRT	0590E	4.021		
FA0603	02	27.01014PSUNV2008SMRT	0590E	2.1		

External File Example

Processing the External File

After creating the external file, use the FA Inbound process to process the file.

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files).

FA Inbound

Run Control ID: FILE_IMPORT
[Report Manager](#)
[Process Monitor](#)

Process Instance: 619

Run Option:
☒ Single File
☐ File List

Inbound File: \\ENC-SERVER\TEMP\HERASAMPLE.TXT

ISIR TG

Number:

FA Inbound page

The FA Inbound process recognizes the grant file by reading the first row of the file and recognizing that the first row contains ELG HEADER beginning at the first position. The data from the file is used to create grant eligibility rows in the ACG/SMART Grant Eligibility component. A message is also entered in the component indicating that the data was loaded from an external file.

Data validation is performed and where data already exists in the table, the record is skipped.

Maintaining HERA Academic Level Values

Two methods exist for calculating a student's HERA academic level. The method that you use is determined by the aid year for which you are assessing a student's eligibility for an ACG or SMART grant.

For aid years 2008 and 2010 onwards, you must monitor students' academic progress using grade levels determined by total completed units and the load level rule assigned in the HERA Academic Level Rule Setup page.

This method is called the HERA Level/Load Rule method in PeopleBooks.

For aid year 2009, you must monitor students' academic progress based on the school's federal academic year (completed units and weeks of instructions).

This method is called the Federal Academic Year method in PeopleBooks.

Note. You may see unexpected HERA level calculations as a result of the calculation methods changing from one aid year to the next. The Financial Aid Term process continues to determine HERA levels using the appropriate calculation method for the term's aid year.

This section provides an overview of HERA academic level calculations and describes how to:

- View HERA academic level information.
- View the HERA academic level on FA term.
- View changes in a student's FA term information
- Override Weeks of Instruction and Method values.

Understanding HERA Academic Level Calculations

Examples in this section illustrate how the HERA academic level is affected as the calculation method changes from the HERA Level/Load Rule method to the Federal Academic Year method. You should already be familiar with both methods and requirements and have reviewed the Setting Up Financial Aid Term for HERA Level Calculations section in the Setting Up ACG and SMART chapter.

Examples in this overview compare results based on the parameters selected on the HERA Academic Level page for the following calculation methods:

- HERA Level/Load Rule method.
- Federal Academic Year: Terms Attended method.
- Federal Academic Year: Grade Level method.

- Federal Academic Year: Credits Earned method.

The parameters listed in the example tables represent the fields on the HERA Academic Level page, which is described later in this section.

HERA Level/Load Rule Method Example

In a 24-unit, 30-week, semester (2 payment periods) institution, a second year student's HERA level information would look like this:

<i>Fields</i>	<i>Fall 2007</i>	<i>Spring 2008</i>	<i>Fall 2008</i>	<i>Spring 2009</i>
<i>HERA Academic Level</i>				
Beginning of Term	1st Year	1st Year	2nd Year	2nd Year
End of Term	1st Year	2nd Year	2nd Year	2nd Year
New Calculation message displays?	No	No	No	No
<i>Weeks of Instruction</i>				
Method	N/A	N/A	N/A	N/A
Term Weeks	N/A	N/A	N/A	N/A
Transfer Weeks	N/A	N/A	N/A	N/A
<i>Cumulative Weeks</i>				
Beginning of Term	N/A	N/A	N/A	N/A
End of Term	N/A	N/A	N/A	N/A
<i>Cumulative Units</i>				
Beginning of Term	N/A	N/A	N/A	N/A
End of Term	N/A	N/A	N/A	N/A
Units Enrolled	12	12	16	0
Units Transferred	0	0	8	0

Federal Academic Year: Terms Attended Method for 2009 Example

For the same student, the results change when using the Terms Attended method. In this example, the Fall 2008 term is in progress.

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<i>HERA Academic Level</i>				
Beginning of Term	1st Year	1st Year	2nd Year	2nd Year
End of Term	1st Year	2nd Year	2nd Year	2nd Year
New Calculation message displays?	No	No	Yes	Yes
<i>Weeks of Instruction</i>				
Method	Term	Term	Term	Term
Term Weeks	15	15	15	15
Transfer Weeks	0	0	10	0
<i>Cumulative Weeks</i>				
Beginning of Term	N/A	N/A	40	40
End of Term	N/A	N/A	55	55
<i>Cumulative Units</i>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Terms Attended method:

- Weeks of instruction information is calculated for all terms, but is not used to recalculate the HERA levels in terms in which the new calculation message does not display.
- Cumulative weeks are hidden for terms in which the new calculation message does not display.
- Only transfer work counted in the Include in FA WI Stats fields is used to calculate transfer weeks. All accepted transfer units are counted in cumulative units.
- Beginning with the Fall 2008 term, weeks of instruction was used to calculate HERA levels.
- Spring 2009 is based on projected enrollment.

Federal Academic Year: Grade Level Method for 2009 Example

For the same student, the results change again when the Grade Level method is used.

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<i>HERA Academic Level</i>				

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
Beginning of Term	1st Year	1st Year	2nd Year	2nd Year
End of Term	1st Year	2nd Year	3rd Year	2nd Year
New Calculation message displays?	No	No	Yes	Yes
<i>Weeks of Instruction</i>				
Method	Grade Level	Grade Level	Grade Level	Grade Level
Term Weeks	0	0	0	0
Transfer Weeks	0	0	0	0
<i>Cumulative Weeks</i>				
Beginning of Term	N/A	N/A	0	0
End of Term	N/A	N/A	0	0
<i>Cumulative Units</i>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Grade Level method:

- The weeks of instruction fields are display only since the information is not used.
- Only transfer work counted in the Include in FA WI Stats fields is included in the cumulative units.

Federal Academic Year: Credits Earned Method for 2009 Example

For the same student, the results change again when the Credits Earned method is used.

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
<i>HERA Academic Level</i>				
Beginning of Term	1st Year	1st Year	2nd Year	2nd Year
End of Term	1st Year	2nd Year	3rd Year	2nd Year
New Calculation message displays?	No	No	Yes	Yes
<i>Weeks of Instruction</i>				

Fields	Fall 2007	Spring 2008	Fall 2008	Spring 2009
Method	Credit	Credit	Credit	Credit
Term Weeks	15	15	20	15
Transfer Weeks	0	0	10	0
<i>Cumulative Weeks</i>				
Beginning of Term	N/A	N/A	40	40
End of Term	N/A	N/A	60	55
<i>Cumulative Units</i>				
Beginning of Term	0	12	32	32
End of Term	12	24	48	44

Note that for the Credits Earned method:

- Weeks of instruction information is calculated for all terms, but is not used to recalculate the HERA levels in terms where the new calculation message does not display.
- Cumulative weeks are hidden for terms in which the new calculation message does not display.
- Only transfer work counted in the Include in FA WI Stats fields is used to calculate Transfer Weeks. All accepted transfer units are counted in Cumulative Units.
- Beginning with the Fall 2008 term, weeks of instruction was used to calculate HERA levels
- Spring 2009 is based on projected enrollment.

Pages Used to Maintain HERA Values

Page Name	Definition Name	Navigation	Usage
HERA Academic Level	STDNT_FA_ASGAL_SEC	Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level, HERA Academic Level. Then click the View HERA Academic Level link.	Displays the HERA academic levels calculated by FA Term.
HERA Academic Level on FA Term	SFA_ASG_ELIGAL_SEC	Click the HERA Level link on the ACG/SMART Grant Eligibility page.	View the HERA level information for the term.

Viewing HERA Academic Level Information

Access the HERA Academic Level page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Acad Level and click the View HERA Academic Level link).

HERA Academic Level

Fname Lastname34

ID: FAASG044

Academic Institution: PeopleSoft University

Term: 2010 Spr

Effective Date: 02/19/2009

Seq: 1

HERA Academic Level

Override

Calculated Values

☐ Beginning of Term:

4th Year

4th Year

☐ End of Term:

5th Year

5th Year

HERA Cumulative Units

Units Beginning of Term:

113.000

N/A

Units End of Term:

125.000

N/A

HERA Academic Level page (2010 aid year onwards)

HERA Academic Level		
Fname Lastname34	ID:	FAASG044
Academic Institution: PeopleSoft University	Term:	2009 Spr
Effective Date: 02/19/2009	Seq:	1
HERA Academic Level		
Override	Calculated Values	
<input type="checkbox"/> Beginning of Term: 4th Year	4th Year	New Level Method Used
<input type="checkbox"/> End of Term: 5th Year	5th Year	
HERA Weeks of Instruction		
Override	Calculated Values	
<input type="checkbox"/> Method: Term	Term	
<input type="checkbox"/> Term Weeks: 15.00	15.00	
<input type="checkbox"/> Transfer Weeks: 0.00	0.00	
Cumulative Weeks:		
Beginning of Term: 138.75	N/A	
End of Term: 153.75	N/A	
HERA Cumulative Units		
Units Beginning of Term: 113.000	N/A	
Units End of Term: 122.000	N/A	

HERA Academic Level page (2009 aid year)

Use this page to view the results of the FA Term HERA level calculations for both the academic level and weeks of instructions. The HERA academic level is calculated for any non-graduate, non-professional student, based on the NSLDS loan year value in FA Term.

When the HERA academic levels are calculated using the Federal Academic Year (2009) method, the *New Level Method Used* message appears in the HERA Academic Level group box and the HERA Weeks of Instruction group box appears on the page. The message does not appear when the HERA academic levels are calculated using the HERA Level/Load Rule method.

Note. For terms prior to the 2009 aid year (HERA Level/Load Rule method), the HERA Weeks of Instruction group box still appears on the page.

From the 2010 aid year onwards (HERA Level/Load Rule method), the HERA Weeks of Instruction group box no longer appears on the page.

Use the calculated values to determine whether or not to override any values or parameters. Fields that have been overridden by the user can be expired using the Override Expiration Date functionality.

The HERA Academic Level on FA Term page (click the HERA Level link on the ACG/SMART Grant Eligibility page) behaves in the same way as the HERA Academic Level page.

Note. For the 2010 aid year: After you set the End Weeks of Instruction Calc Term value (on the HERA Weeks of Instruction Setup page) to the first term of the 2010 aid year, when the FA Term build occurs, it determines HERA levels based on the school's HERA Academic Level settings for all 2010 and future terms (the HERA Level/Load Rule method). For all terms prior to the 2010 aid year, HERA levels are determined by the relevant calculation methods (HERA Level/Load Rule method for 2008 and Federal Academic Year method for 2009).

See [Chapter 6, "Setting Up ACG and SMART Grants," Setting Up Financial Aid Term for HERA Academic Level Calculations, page 157.](#)

HERA Academic Level Discrepancies

In some cases, the HERA levels calculated in 2009 terms do not progress the same as in 2010. For example, the Spring 2009 term might calculate an end of term HERA level of 2nd year, but in the Fall 2009 term, the beginning of term level is 3rd year. This might be caused by the student having enough cumulative units to be 3rd year for the Spring, but not enough cumulative weeks of instruction. The following term, in which the level no longer considers weeks of instruction, the student can be made 3rd year level.

HERA Academic Level

Beginning of Term	<p>Select the student's level based on all completed work and weeks of instruction prior to the current enrolled term. You can base the value on projected information and override it. This is the primary value used for establishing eligibility, awarding, disbursing, and reporting to COD for ACG and SMART grants.</p> <p>Values are:</p> <p><i>1st Yr Nvr</i> (first year, never attended college)</p> <p><i>1st Year Prev</i> (first year, previous college enrollment)</p> <p><i>2nd Year</i></p> <p><i>3rd Year</i></p> <p><i>4th Year</i></p> <p><i>5th Year</i></p>
End of Term	<p>Select the student's level based on the student's completed work and weeks of instruction, including the current enrolled term. You can base the value on projected information and override it.</p>
Calculated Values/Override	<p>Select the Override check box to change the HERA level value. The calculated values always display what FA Term has calculated as the student's HERA level. The override check boxes are automatically selected if the current level does not match the calculated value.</p>

HERA Weeks of Instruction

This group box displays the weeks of instruction information to be used in determining HERA levels.

Note. The Weeks of Instruction group box does not appear on the HERA Academic Level page from the 2010 aid year onwards.

Weeks of instruction information can exist for terms in which the Federal Academic Year method was not used for HERA academic level calculation. For example, an ACG or SMART grant candidate was enrolled for terms in the 2008 aid year. Terms in this aid year use the HERA Level/Load Rule method to determine HERA levels. The WI information calculated for those terms is used by the Federal Academic Year method (used for the 2009 aid year only) to determine HERA levels for the 2009 aid year terms.

Note. You can override the Method, Term Weeks, and Transfer Weeks fields. However, unlike the other fields in FA Term that can be overridden, an override of these fields is permanent and cannot be reset by using the Override Expiration Date functionality. An override of the method carries forward when new, future terms are created.

For more information on how to perform overrides,

See [Chapter 39, "Processing ACG and SMART Grants," Overriding Weeks of Instruction and Method Values, page 1561.](#)

Method	<p>Select the method by which weeks of instruction was calculated. Values are:</p> <p><i>Credit Based</i></p> <p><i>Exact Accounting</i></p> <p><i>Grade Level Based</i></p> <p><i>Term based</i></p> <p>For terms prior to 2009, the field can be populated, but the information is not used to determine the HERA academic levels for the updated term.</p> <p>If overridden, the FA Calc check box is set for the term, and the weeks of instruction fields are recalculated using the new method during the next batch or online FA Term run.</p>
Term Weeks	<p>Select the number of weeks of instruction calculated for the term. The value depends on the WI method used.</p> <p>For terms prior to the 2009 aid year, the field can be populated. This information is only used to calculate HERA levels for 2009, where the Federal Academic Year method is used.</p>
Transfer Weeks	<p>Select the number of transfer weeks of instruction calculated for the term. The value depends on the WI method used.</p> <p>For terms prior to 2009, the field can be populated, but the information is not used to determine the HERA academic levels for the updated term.</p>
Cumulative Weeks – Beginning of Term	<p>Displays the sum of all term weeks and transfer weeks from prior terms. The value for the current term transfer weeks is included.</p> <p>This field does not appear for terms using the HERA Level/Load Rule method calculation method.</p>

Cumulative Weeks – End of Term Displays the beginning of term value plus the value for the current term weeks. This field does not appear for terms using the HERA Level/Load Rule method calculation method.

The fields that display in the Calculated Values column show the system-calculated values for the adjacent field. Use this column to view what FA Term has calculated for an overridden field. The Term Weeks value is calculated based on the active method, not the calculated method.

HERA Cumulative Units

Units Beginning of Term Displays the number of completed units not including the current term. Articulated transfer work for the current term is included. Financial Aid progress units in excess of the units earned towards the student's degree are not included. If the Grade Level method is used to calculate the HERA level for the term, any transfer work not marked to be included in the HERA level calculation is excluded.

Units End of Term Displays the beginning of term value plus the current enrolled units. This value adjusts at the end of the term based on whether the enrolled courses have been graded. This value can be projected.

Viewing the HERA Academic Level on FA Term

Access the HERA Academic Level on FA Term page (click the HERA Level link on the ACG/SMART Grant Eligibility page).

HERA Academic Level on FA Term			
Eldeera Willis		ID: FAASG016	
Institution: PSUNV		Grant Type: Academic Competitiveness	
Aid Year: 2009		Term: 2008 Fall	
HERA Academic Level			
Override		Calculated Values	
<input type="checkbox"/> Beginning of Term:	1st Yr Prv	1st Yr Prv	New Level Method Used
<input type="checkbox"/> End of Term:	1st Yr Prv	1st Yr Prv	
HERA Weeks of Instruction			
Override		Calculated Values	
<input type="checkbox"/> Method:	Exact	Exact	
<input type="checkbox"/> Term Weeks:	15.00	15.00	
<input type="checkbox"/> Transfer Weeks:	0.00	0.00	
Cumulative Weeks:			
Beginning of Term:	0.00	N/A	
End of Term:	15.00	N/A	
HERA Cumulative Units			
Units Beginning of Term:	3.000	N/A	
Units End of Term:	15.000	N/A	

HERA Academic Level on FA Term page

Use this page to quickly view the HERA level information for the term without opening the FA Term component.

Viewing Changes in a Student's FA Term Information

Changes to an audited field cause a new FA Term row to be created for the term on the FA Term Field Audits page (Financial Aid, Financial Aid Term, Maintain Student FA Term, Financial Aid Info, then click Field Audits).

There are 42 fields audited by FA Term:

Fields Audited by the FA Term Process		
ACAD_CAREER	CUR_RESIDENT_TERMS	SFA_ASG_WI_CUM_BOT
ACAD_LEVEL_BOT	EXP_GRAD_TERM	SFA_ASG_WI_CUM_EOT
ACAD_LEVEL_EOT	FA_LOAD	SFA_ASG_UNITS_BOT
ACAD_LEVEL_PROJ	FA_LOAD_CURRENT	SFA_ASG_UNITS_EOT
ACAD_PLAN	FA_NUMBER_OF_WEEKS	SFA_ASG_WI_TCR
ACAD_PLAN_TYPE	FA_REBUILD_DT	SFA_ASG_WI_TRM
ACAD_PROG_PRIMARY	FA_UNIT_ANTIC	STUDY_AGREEMENT
ACAD_SUB_PLAN	FA_UNIT_COMPLETED	TERM_SRC
ACADEMIC_LOAD	FA_UNIT_CURRENT	TOT_PASSD_FA
ADMIT_TERM	FA_UNIT_IN_PROG	TOT_TAKEN_FA
CAMPUS	FORM_OF_STUDY	UNT_PASSD_FA
COURSE_LD_PCT	LS_GPA	UNT_TAKEN_FA
CUM_GPA	SFA_ASG_AC_LVL_BOT	WEEKS_OF_INSTRUCT
CUM_RESIDENT_TERMS	SFA_ASG_AC_LVL_EOT	WITHDRAW_CODE

Overriding Weeks of Instruction and Method Values

You can override the weeks of instruction values for a specific term and have the override values used in the HERA level calculations. You can also override the weeks of instruction method and recalculate the HERA level based on the current method.

Unlike other fields in FA Term that can be overridden, an override of WI fields is permanent and cannot be reset by using the Override Expiration Date functionality. The HERA Academic Level Beginning of Term and End of Term fields continue to adhere to the override expiration date. An overridden term weeks or transfer weeks has impact beyond the current term. This is because the cumulative weeks value is calculated by adding the term week and transfer week values from all previous terms. Therefore, HERA level calculations for any subsequent terms are impacted by any overrides of these fields.

Before overriding any HERA level calculation fields, consider the effect on:

- Terms prior to 2009 that were calculated under the HERA Level/Load Rule method.

The HERA academic levels for these terms are not affected by any override of the calculation method or the term weeks value or transfer weeks value. HERA levels calculated under the HERA Level/Load Rule method do not display the *New Level Method Used* message on the page.

- Beginning of term HERA level is calculated using the current term transfer weeks value.

That is consistent with how transfer work is treated in FA Term. If the transfer weeks value is overridden, make sure to check the impact on the beginning of term level after rebuilding the term.

- Beginning of term HERA level is not calculated based on the current term weeks value.

Term weeks is considered in the end of term cumulative weeks and end of term HERA level calculations.

- New, future term records created after an override of the method in the most recent term are assigned the override method.

This does not occur for terms already created.

For the following override cases, follow the procedures to ensure correct calculation of the student's HERA levels.

<i>Override Case</i>	<i>Required Procedure</i>
Student requests an exact accounting of their weeks of instruction.	<p>When this occurs, this calculation method becomes a permanent change for the student. This assumes that the current calculation method is not the Exact Accounting method.</p> <p>Step 1: For each active FA Term, override the method to Exact. This sets the FA Calc check box.</p> <p>Step 2: If the HERA level should not be recalculated using the new method for any past terms, lock the HERA level by checking the override check box for the HERA levels.</p> <p>Note. This does not apply to terms calculated using the HERA Level/Load Rule calculation method. The levels for these terms are unaffected by the changing of the method.</p> <p>Step 3: Run FA Term build. This rebuilds all the terms, recalculates the term weeks using the Exact Accounting method, and recalculates the HERA levels.</p> <p>When future terms are created, the override method is assigned.</p>
Delivered setup does not allow for the correct assignment of the calculation method.	<p>An institution may have a specific population of students that must have a different method used instead of the one assigned based on the Weeks of Instruction setup.</p> <p>Step 1: Identify the affected students.</p> <p>Step 2: For each active FA Term, override the method to the appropriate value. This sets the FA Calc check box.</p> <p>Step 3: Rebuild FA Term to recalculate all HERA level information.</p> <p>When future terms are created, the override method is assigned.</p>
Student changes major, which causes a different WI method to be used.	<p>The cumulative weeks of instruction must be adjusted so that they are correct in the first term of the new major. Do this by updating the weeks of instruction for all prior terms. Care must be taken to ensure that the HERA levels from the prior terms are not affected. This procedure is similar to an exact accounting request.</p> <p>Step 1: Lock the HERA levels for all prior terms.</p> <p>Note. You do not need to lock levels for terms that use the current HERA level calculation method.</p> <p>Step 2: Override the Method for all prior terms so that they match the method used for the new major.</p> <p>Step 3: Rebuild FA Term so that the weeks of instruction are recalculated.</p>

Override Case	Required Procedure
<p>Institution does not use transfer credit module, but needs to document and apply the transfer weeks of instruction to their HERA level calculations.</p>	<p>Institutions must perform a manual calculation of their transfer weeks of instruction, but once entered, the HERA levels calculate correctly in the future.</p> <p>Step 1: Establish a procedure for identifying students with transfer work that require review. For example, an equation could be created that identifies such students when the grant evaluation process is run, if there is a data attribute that defines this population. This could also be a report generated from an external system.</p> <p>Step 2: Calculate the transfer weeks of instruction manually.</p> <p>Step 3: Determine the articulation term for the transfer work. Note the current calculation method assigned to the term.</p> <p>Step 4: If the method is Exact, Term, or Credit, enter in the transfer weeks into field and set the override check box. If the method is (Grade) Level, do not enter any transfer weeks.</p> <p>Step 5: Make sure transfer units have been entered in Student Records.</p> <p>Note. This assumes that institutions who do not use the transfer credit module already have a method in place for adding the transfer work into Student Records which is then accessible by FA Term.</p> <p>Step 6: Rebuild FA Term.</p>
<p>Transfer work was articulated for a term where no FA Term record is created.</p>	<p>If only the student's FA Term record needs to be created, create the FA Term record and the transfer weeks are calculated. If the FA term record is not created, such as when the student was never enrolled at the institution, a manual adjustment is required.</p> <p>Step 1: Establish a procedure for identifying students with articulated transfer work for a term that has no corresponding FA term record. This could be accomplished by creating an equation edit used in the grant eligibility process.</p> <p>Step 2: Calculate the transfer weeks of instruction manually for the articulated term of the transfer credit.</p> <p>Step 3: Find the first active FA Term record that occurs after the articulated term.</p> <p>Step 4: If the method is Exact, Term, or Credit, add the calculated transfer weeks of instruction to the existing transfer weeks value. This results in a permanent override of the transfer weeks for the term. No adjustment is necessary if the (Grade) Level method is used.</p> <p>Step 5. Rebuild FA Term for the current aid year to recalculate the HERA levels.</p>

Reviewing Transfer Work for FA Term HERA Level Determination

To ensure that an accurate HERA level calculation is performed for your ACG and SMART grant candidates, review and update all transfer work. The review of a student's transfer work requires that you identify all acceptable transfer work to be used to either calculate a *Transfer Weeks of Instruction* value, or be included in the cumulative units for the Grade Level calculation method.

Transfer work is considered articulated when the transfer credit evaluation process has already been completed for a student. Articulated transfer work has a model status of *Posted*.

This section provides an overview of how different calculation methods impact transfer work, and overview of the steps to review transfer work, and discusses how to:

- Review articulated transfer course work.
- Review articulated transfer test credits.
- Review new transfer credit.

Understanding How Different Calculation Methods Impact Transfer Work

To support the Federal Academic Year method of calculation, implemented for the 2009 aid year, the transfer credit components were modified to allow administrators to identify the courses that would be used to determine a weeks of instruction value. Because weeks of instruction is not used to determine HERA levels beginning in 2010, if you are no longer determining eligibility for ACG and SMART grants for the 2009 aid year, you do not need to review transfer work for weeks of instruction consideration for 2010 and future terms.

Note. Although you do not have to calculate weeks of instruction from transfer work for 2010 HERA level calculations, you may still need to review transfer work for determining general eligibility for ACG and SMART – for example for GPA calculation and acceptable coursework review.

Understanding the Steps to Review Transfer Work

To ensure that the FA Term process uses any articulated transfer work to calculate HERA levels, you must perform the following tasks.

Note. These tasks use the transfer credit evaluation module and therefore, collaboration with the Student Records staff is required. The transfer credit information in this chapter supplements the current transfer credit evaluation documentation in the *PeopleSoft Enterprise Student Records 9.0 PeopleBook*.

1. Unpost the transfer credit for the student.
2. Verify that the articulated transfer courses, test credits, and other credits have been correctly updated to indicate whether the transfer work will be used to calculate a *Transfer Weeks Of Instruction* value.
3. Run the transfer credit calculation process to populate the Include in Financial Aid Weeks of Instruction Stats fields. The FA Term process uses the data in these fields to calculate the *Transfer Weeks Of Instruction* value. For institutions using the Grade Level method, the transfer course is included in the student's cumulative units.
4. Post the recalculated transfer credit. This ensures that the FA Calc flag in the Student Career Term record for the student is set. You must re-post the transfer work even if no changes were made.
5. If necessary, repeat the same steps for the two other transfer credit sources: test credits (component Test Credits – Manual) or other credits (component Other Credits – Manual). It is unlikely that you would need to update any transfer work captured in these areas that are not expected to be included in the *Transfer Weeks Of Instruction* calculation.

Pages Used to Review Transfer Work

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transfer Course Entry	TRNS_CRSE_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Course Entry	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules.
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the Details link on the Transfer Course Details page.	View incoming course credit information for a specific row of a course transfer credit model, and view and edit equivalent course information.
Course Credits by Term	TRNS_CRSE_TERM	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Course Credits by Term	Calculate a student's transfer credit statistics for a model based on the accepted internal equivalent courses of the model.
Test Credit Entry	TRNS_TEST_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit Entry	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules.
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the Edit Equivalent Course button on the Test Credit Entry page.	Add incoming test credit information and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.

Page Name	Definition Name	Navigation	Usage
Test Credit by Term	TRNS_TEST_TERM	Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model.

Reviewing Articulated Transfer Course Work

This section demonstrates the steps outlined in the overview as applied to reviewing articulated transfer course work.

Step 1: Unpost the transfer work.

Access the Course Credits by Term page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term).

The screenshot displays the 'Course Credits by Term' page. At the top, there are tabs for 'Transfer Course Entry' and 'Course Credits by Term'. Below the tabs, the student ID 'Student Test1' and course ID 'FAASG001' are shown. The 'Transfer Credit Model' section includes fields for Academic Career (UGRD), Academic Institution (PSUNV), Model Nbr (1), and Academic Program (LAU). Below this, the 'Articulation Term' is 2007 Fall, and the 'Model Status' is Complete. The 'Posted Date' is 06/12/2008, and the 'User ID' is Betty Locherty. There are three buttons: 'Calculate', 'Post', and 'Unpost'. The 'Unpost' button is highlighted with a red box. Below the buttons, the 'Units Taken' is 8.00 and 'Units Transferred' is 6.000. There is also a section for 'Include in FA WI Stats' with 'Units Taken' at 0.00 and 'Units Transferred' at 0.000. At the bottom, the 'Course Credits Summary' section shows 'Units Taken' as 8.00 and 'Units Transferred' as 6.000.

Course Credits by Term page

Click the Unpost button to run the Unpost process. Unposting causes the student's transfer work to be removed from the student career term record. This transfer work must be reposted after you have completed your review.

Step 2: Review transfer course work.

Access the Transfer Course Entry page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry).

The screenshot displays the 'Transfer Course Entry' page for Student Test1 (FAASG001). The page is divided into several sections:

- Transfer Credit Model:** Academic Career: UGRD (Undergraduate), Academic Institution: PSUNV (PeopleSoft University), *Model Nbr: 1, *Transcript Level: Unofficial.
- Target Information:** *Academic Program: LAU (Liberal Arts Undergraduate), Academic Plan: UNDECL-UG (Undeclared Undergraduate). There is an 'Include in GPA' checkbox.
- Source Information:** *Credit Source Type: Manual, Source Institution: Transfer School, School Type: NA (Not Applicable).
- Transfer Credit Term:** *Articulation Term: 0590 (2007 Fall), Submitted.
- Course Details:** A table showing incoming and equivalent courses. The incoming course is MATH 1 (Math 1) with 4.00 units taken and a grade input of A. The equivalent course is MATH 111 (001005) with 3.000 units transferred. Grading Scheme is UGD (Undergrad) and Grading Basis is GRD (Graded). Official Grade is T (Transfer).

At the bottom, there is a link to 'Add/View Comments'.

Transfer Course Entry page

Use this page to review all course work accepted by the institution. The course work is displayed by term in the Transfer Credit Term group box. Review each accepted course and verify the courses to be used in the Transfer Weeks Of Instruction calculation. Note that when the transfer credit evaluation is complete, the field is not accessible and the field name is grayed out.

Note. Transfer course work can be stored in more than one model and for more than one term. Be sure to review all courses.

Click the Details button to access the Equivalent Course Information page for each course.

Equivalent Course Information			
Incoming Course			
Term Year:	2007	FALL	
Subject:	MATH	Course Nbr:	1
Description:	Math 1		
Units Taken:	3.00	Grade Input:	A
		Crse Level:	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			
Equivalent Course			
Course ID:	001005	Calculus I	<input type="button" value="Clear"/>
Offer Nbr:	1	MATH 111	
Units Transferred:	3.000		<input checked="" type="checkbox"/> Valid Attempt
Grading Scheme:	UGD	Undergraduate Grading Scheme	Grd Pt/Unt: 4.000
Grading Basis:	GRD	Graded	<input checked="" type="checkbox"/> Earn Credit
Official Grade:	A	Excellent	<input checked="" type="checkbox"/> Include in GPA
Repeat Code:			Units Att: Yes
Designation:			
<input checked="" type="checkbox"/> Include in FA WI Stats			

Equivalent Course Information page

Use the Include in FA WI Stats check box at the bottom of this page to include or exclude each course in the weeks of instruction statistics. For courses that are eligible, select the check box. Continue until all courses have been reviewed, then go to Step 3.

Step 3: Recalculate the transfer work

Access the Course Credits By Term page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term).

Transfer Course Entry **Course Credits by Term**

Student Test1 FAASG001

Transfer Credit Model Find | View All First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: PSUNV PeopleSoft University

Model Nbr: 1

Academic Program: FAU Fine Arts Undergraduate

Admit Type/Term:

Articulation Term: 2007 Fall **Posted Date:** 03/25/2008

Model Status: Posted **User ID:** Betty Locherty

Calculate **Post** **Unpost**

Units Taken: 3.00

Units Transferred: 3.000

Include in FA WI Stats

Units Taken: 0.00

Units Transferred: 0.000

Course Credits Summary

Units Taken: 3.00

Units Transferred: 3.000

Course Credits by Term page

Click the Calculate button. This causes any acceptable transfer work to be populated in the Include In FA WI Stats group box. The FA Term process uses this information when determining the student's HERA levels. A successful calculation results in the Post button becoming active.

Find | View All First 1 of 1 Last

Articulation Term: 2007 Fall **Posted Date:** 06/12/2008

Model Status: Submitted **User ID:** Betty Locherty

Calculate **Post** **Unpost**

Units Taken: 8.00

Units Transferred: 6.000

Include in FA WI Stats

Units Taken: 8.00

Units Transferred: 6.000

Course Credits Summary

Units Taken: 0.00

Units Transferred: 0.000

Course Credits By Term page after calculation

This page shows that the Include in FA WI Stats data is now calculated.

Note. You must repeat the calculation process for all models and terms in which transfer course work exists.

Step 4: Post the transfer work.

Finally, run the Post process. This updates Course Credit Summary data and updates the student career term record with the transfer credit. FA Term checks the student career term record to determine whether any updated transfer work exists. If the work is not reposted, FA Term does not use the transfer work. When reviewing previously posted work, you must repost the work whether or not you made any changes.

Reviewing Articulated Transfer Test Credits

This section demonstrates the steps outlined in the overview as applied to reviewing articulated transfer course work.

Note. Most institutions are unlikely to need to review their transfer test credits. Test credits generally cannot be used in determining the transfer weeks of instruction. Follow the same steps as for transfer course credit using the transfer test credit pages.

Step 1: Unpost the transfer test credits.

Access the Test Credit by Term page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term).

The screenshot displays the 'Test Credit by Term' page. At the top, there are tabs for 'Test Credit Entry' and 'Test Credit by Term'. The main content area is titled 'Student Test1' and 'FAASG001'. It includes a search bar with 'Find | View All' and a pagination indicator 'First 1 of 1 Last'. Below this, there are several fields for student information: Academic Career (UGRD), Academic Institution (PSUNV), Model Nbr (1), and Academic Program (LAU). The Admit Term is listed as 2008 Spr. A section for 'Articulation Term' shows 2008 Spr, with a Posted Date of 06/12/2008 and a User of Betty Locherty. The Model Status is Complete. There are three buttons: Calculate, Post, and Unpost. The Unpost button is highlighted with a red border. Below the buttons, there is a section for 'Units Transferred' showing 3.000. A collapsed section titled 'FA Weeks of Instruction Stats' shows 0.000. At the bottom, there is a 'Test Credits Summary' section showing Units Transferred as 3.000.

Test Credit by Term page

Click the Unpost button to run the Unpost process. Unposting causes the student's transfer test credit to be removed from the student career term record. This transfer work must be reposted after you have completed your review.

Step 2: Review the transfer test credits.

Access the Test Credit Entry page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry).

Test Credit Entry | Test Credit by Term

Julius Welch FAASG022

Find | View All First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: PSUNV PeopleSoft University

*Model Nbr: 1

*Transcript Level: Unofficial

Target Information

*Academic Program: LAU Liberal Arts Undergraduate ☐ Include in GPA

Academic Plan: BIOLBS Biology (BS)

Find | View All First 1 of 1 Last

*Articulation Term: 0570 2006 Fall Posted

*Group	*Seat#	Status	Test ID	Test Component	Equivalent Subject / Collg Nbr
1	1	Posted	AP	MAB	MATH 111

[Add/View Comments](#)

Test Credit Entry page

Use this page to evaluate the transfer test credits.

Note. Transfer test credit can be stored in more than one model and more than one term in the page. All test credit must be reviewed.

Click the Edit Equivalent Course button on the Test Credit Entry page to access the Equivalent Course Information page.

Equivalent Course Information

Test Credit Input

Test ID:

AP

Adv Plcmnt

Component:

MAB

Mathematics: Calculus AB

Data Source:

ACT

Test Score:

4.00

Test Date:

10/08/2006

Percentile:

Equivalent Course

Course ID:

001005

Calculus I

Offer Nbr:

1

MATH

111

Units Transferred:

3.000

☒ Valid Attempt

Grading Scheme:

UGD

Undergraduate Grading Scheme

☒ Earn Credit

Grading Basis:

GRD

Graded

☐ Include in GPA

Official Grade:

T

Transfer

Grd Pt/Unt:

3.000

Repeat Code:

Units Att:

Yes

Designation:

☐ Include in FA WI Stats

Equivalent Course Information page

Select the Include in FA WI Stats check box if you want the system to use the test credits when calculating the *Transfer Weeks Of Instruction* value.

Step 3: Recalculate the transfer test credits.

Access the Test Credit By Term page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term).

Test Credit Entry Test Credit by Term

Student Test1 FAASG001

Find | View All First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: PSUNV PeopleSoft University

Model Nbr: 1

Academic Program: LAU Liberal Arts Undergraduate

Admit Term:

Articulation Term: 2008 Spr Posted Date: 06/12/2008

Model Status: Submitted User: Betty Locherty

Calculate Post Unpost

Units Transferred: 3.000

FA Weeks of Instruction Stats

Units Transferred: 0.000

Test Credits Summary

Units Transferred: 0.000

Test Credit by Term page

Click the Calculate button to populate the FA Weeks of Instruction Stats fields.

Repeat the calculation process for all models and terms for which transfer test credits were updated.

Step 4: Post the transfer test credits.

Click the Post button to update Test Credits Summary data and updates the student career term record with the transfer test credit. The FA Term process checks the student career term record to determine whether any updated transfer work exists. If the work is not reposted, FA Term does not use the transfer work.

Reviewing New Transfer Credit

Ideally, Transfer Credit Evaluation staff could be trained to update the transfer work for the Financial Aid office during their processing of new transfer course work. When new transfer work is evaluated, the following occurs:

- All newly entered transfer course work is set with the Include in FA WI Stats check box selected. For transfer course work, this is the correct setting to make in most cases.
- All newly entered transfer test credits is set with the Include in FA WI Stats check box not selected. This is because test credits are not usually included in the Transfer Weeks Of Instruction calculation.
- All newly entered transfer other credit sources is set with the Include in FA WI Stats check box not selected. Other credits refer to work and life experience credits. Currently, these credits cannot be included in the Transfer Weeks Of Instruction calculation.

With the above behavior in place for new transfer work, you need only identify the conditions in which the default behavior is not valid and update the Include in FA WI Stats check box appropriately. All new transfer work is calculated and posted as part of completing the overall transfer credit evaluation process.

Understanding the Packaging Process for ACG and SMART Grants

This section reviews how the Packaging process handles ACG and SMART grants in these areas:

- Eligibility
- Disbursement plan
- Disbursement protection
- Eligibility statuses
- Projected awards

Note. In Bundle 11, January 2009, the Financial Aid module was updated to accommodate SMART3 and fifth-year undergraduates because the Ensuring Continued Access to Student Loans Act (ECASLA) added a fifth-year undergraduate senior grant level for students in a five-year program of study. The manual, auto, and mass Packaging routines as well as the Repackaging process work the same to award fifth-year students as they do to award fourth-year students. Any documentation reference made to SMART2 applies to SMART3 as well.

For a general understanding of the Packaging and Repackaging processes, Professional Judgement, and Self Service, refer to these chapters:

- Preparing for Awarding and Packaging
- Awarding and Packaging Students
- Managing Self-Service Awards
- Managing Repackaging

Eligibility

The Packaging process uses four records to determine eligibility for ACG and SMART grants:

- ISIR (Financial Aid, Federal Application Data).
- FA Term (Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term).
- ACG/SMART Eligibility (Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility)
- Incoming Aggregates (Financial Aid, Awards, Aggregates, Update Incoming Aggregates).

Using these records, the Packaging process determines eligibility as follows:

- If the Pell Eligibility flag set from the ISIR process is not equal to Y, the student is not awarded an ACG or SMART grant.

- If the FA Term HERA Academic Level Beginning of Term field is not the same as the ACG/SMART HERA Student Level, no award is granted for that term.
- The student is not required to be full-time for a given term to receive an ACG or SMART award.

Note. Note. According to your school's business practices, ensure that you identify any students who are not full-time students and resolve their FA Load status before performing any Authorization or Disbursement processing.

- The Eligibility Status and HERA Student Level field values from the ACG/SMART Grant Eligibility record are applied.
- The values for Aggregate Area, Aid Year, Aggregate Level, Award Amount, Undergraduate Lifetime Total from the Incoming Aggregates are applied.

Disbursement Plan

Other programs use term-specific disbursement plans to award for a given term, such as spring-only term awarding. But for ACG or SMART awarding, you can use a disbursement plan that spans all terms within the award period. The Packaging process automatically evaluates the ACG/SMART eligibility records and awards to the corresponding term or terms regardless of the Split Code specified based on the student's HERA academic level.

For example, if you have a Disbursement Plan/Split Code that spans both the fall and spring terms, such as 01/01, in the Academic Award Period, and if the student is eligible for ACG2 in Term 1 and SMART1 in Term 2, you can use the same Disbursement Plan (01) for both ACG2 and SMART1. You do not need to specify a fall-only Disbursement Plan for ACG1 and a spring-only Disbursement Plan for ACG2. Provided that your Packaging plan includes both ACG1 and ACG2 as awarding rules, the Packaging process returns a \$650 ACG2 award with a Disbursement Plan of 01/01 for Term 1 and a \$2,000 SMART1 award with a Disbursement Plan of 01/01 for Term 2.

An example is shown on the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package).

Student Aid Package

Need Summary

Term Summary

Jerone,Paulson A

ID: FAPKASG0035

Aid Year: 2008

Financial Aid Year 2007 - 2008

Institution: PSUNV

Career: UGRD Undergrad

Packaging Plan ID: FED_ASG_SM

Award Period: Both

Aggregate Source: Default

Package Status: Applied

Award Notification

Validate

Post

Retrieve

Reset

Award

Status

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code		
10		UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	Disbursement	+
20	X	UGRD	900000000210	ACG1_SEM	0.00	0.00	01	01	Disbursement Message	+
30		UGRD	900000000211	ACG2_SEM	650.00	650.00	01	01	Disbursement	+
40		UGRD	900000000212	SMART1_SEM	2,000.00	2,000.00	01	01	Disbursement	+
50	X	UGRD	900000000213	SMART2_SEM	0.00	0.00	01	01	Disbursement Message	+
60		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement	+
70		UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement	+
80		UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement	+
90		UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	01	01	Disbursement	+
100		UGRD	900000000305	Unsub Staff Sem	1,290.00	1,290.00	01	01	Disbursement	+

Example Disbursement Plan on the Student Aid Package page, Award tab

The ACG2 and SMART1 examples are shown on the Award Disbursement Detail page (click the Disbursement link from the Award tab of the Student Aid Package page).

Award Disbursement Detail

Sequence: 30

Item Type: 900000000211

Net Award Amount: \$650.00

Disbursement Plan: 01

*Split Code: 01

Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0590	Academic	U2	650.00	650.00	650.00	0.00
02	0600	Academic		0.00	0.00	0.00	0.00

Example Award Disbursement Detail page for ACG2

Award Disbursement Detail

Sequence: 40

Item Type: 900000000212

Net Award Amount: \$2,000.00

Disbursement Plan: 01

*Split Code: 01

Custom Split

Disbursement Distribution							
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0590	Academic		0.00	0.00	0.00	0.00
02	0600	Academic	U3	2,000.00	2,000.00	2,000.00	0.00

Example Disbursement Detail page for SMART1

Disbursement Protection

Protection of an ACG or SMART award after it has been disbursed is controlled on the student's ACG/SMART Eligibility record. This protection is controlled at the term level, not at the FA Item Type level. For ACG/SMART Item Types, Disbursement Protection is not an available attribute on the FA Item Type setup.

If the Disbursement Protection attribute is checked at the term level on the ACG/SMART Eligibility record, the disbursed portion of the award for that term is protected from packaging adjustments. The system does not reduce the award below what has already been disbursed for that term.

If the Disbursement Protection attribute is cleared at the term level on the ACG/SMART Eligibility record, the disbursed portion of the award for that term is not protected from packaging adjustments. The system reduces the award below what has already been disbursed for that term.

Eligibility Statuses

For initial awards, the Packaging process uses the awarding option set up on the ACG/SMART Processing Options page. If the awarding option is set to *Eligible*, the system awards ACG or SMART grants that have a status of *Eligible* for the given terms. If the awarding option is set to *Eligible, pending review*, the system awards ACG or SMART grants that have a status of *Eligible* or *Eligible, pending review* for the given terms. For existing awards, where an ACG or SMART award already exists and the system is determining continued eligibility for that award:

- The award is retained if the status is one of the following:
 - *Eligible*
 - *Eligible, Pending Review*
 - *Ineligible, Pending Review*
 - *Not Verified*
- If the status is *Canceled*, the Packaging process reduces the award to \$0, regardless of Disbursement Protection.
- If the status is *Ineligible* and the award has not been disbursed for the term, the Packaging process reduces the award to \$0.
- If the status is *Ineligible* and the award has been disbursed for the term, the Packaging process checks the Disbursement Protection option on the ACG/SMART Eligibility record. If *Y*, the Packaging process reduces the award to disbursed amount. If *N*, the Packaging process reduces the award to \$0.

Projected Awards

If there are more FA Term records than there are ACG/SMART Eligibility records for the student, the Packaging process projects award eligibility for subsequent terms that do not exist on the student's ACG/SMART Eligibility record. The prior (non-projected) term's Academic Level is used to determine the maximum term amount for subsequent terms.

For example, if the student has fall, winter, and spring FA Term records, but only a fall ACG/SMART Eligibility record, the Packaging process projects an award eligibility for the student for the winter and spring terms. The fall HERA Academic Level governs the amount of the award for the subsequent terms (winter and spring). If the student has fall, winter, and spring FA Term records, but only fall and winter Eligibility records, the Packaging process projects an award eligibility for the student for the spring term. The winter HERA Academic Level governs the amount of the award for the subsequent term (spring).

Packaging ACG and SMART Awards in Nonstandard Award Periods

You can package ACG and SMART grants for students in nonstandard award periods, such as a leading or trailing summer. ACG or SMART grants can be awarded for either a single award period (academic or nonstandard) or across multiple award periods (Nonstandard/Academic or Academic/Nonstandard).

You can also package ACG or SMART grants across academic and nonstandard award periods in batch, manual, or automatic packaging mode. Examples in this section include manual and auto packaging for leading summer periods and auto packaging for a trailing summer term.

This section show examples for:

- Awarding ACG or SMART grants for Leading Summer Period (manual).
- Awarding ACG or SMART grants for Leading Summer Period (auto package).
- Awarding ACG or SMART grants for Trailing Summer Period (auto package).

See Also

Chapter 28, "Awarding and Packaging Students," page 983

Pages Used to Award ACG and SMART Grants for Nonstandard Award Periods

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Aid Package	STDNT_AWARD_ENTRY3	Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package	Use auto packaging. Perform online manual awarding and Auto Packaging. Auto Packaging can be combined with online manual awarding in the same awarding session.
Award Disbursement Detail	STDNT_PKG_DISB_SEC	Click the Disbursement link on the Student Aid Manual page, Manual Student Packaging page, or Professional Judgement page.	View award disbursement ID detail as well as create custom split amounts and customize loan fee amounts.

Awarding ACG or SMART Grants for Leading Summer Period (Manual)

You can use the Student Aid Package page to package ACG or SMART awards for students in leading or trailing summer periods. The disbursement plans and split codes associated with the award dictate how the award spans across the award periods.

Access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package).

Disb ID	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10		UGRD	900000000210	ACG1_SEM	750.00	750.00	02	02 Disbursement

Student Aid Package page: Award tab

This example shows the ACG1 award was manually packaged across leading summer and academic award periods using a Disbursement Plan/Split Code that spans both award periods.

To view the disbursement detail for this example, access the Award Disbursement Detail page (click the Disbursement link on the Student Aid Package page).

Award Disbursement Detail

*Sequence: 10 Item Type: 900000000210 Net Award Amount: \$750.00

Disbursement Plan: 02 *Split Code: 02 ☐ Custom Split

Disbursement Distribution				Customize	Find	First	1-3 of 3	Last
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed	
01	0585	Non Std	U0	375.00	375.00	375.00	0.00	
02	0590	Academic	U1	375.00	375.00	375.00	0.00	
03	0600	Academic	U1	0.00	0.00	0.00	0.00	

Award Disbursement Detail page

This Award Disbursement Detail page shows the award spanning across leading summer and fall terms.

Awarding ACG or SMART Grants for Leading Summer Period (Auto Package)

This example shows the student was auto packaged initially with a Leading Summer Packaging plan (Award Period = Nonstandard). The student is subsequently auto packaged with an Academic Award Period packaging plan. Therefore, when you post the award, it results in a Custom Split for ACG1.

Access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package).

Student Aid Package | Need Summary | Term Summary

Buierone, Kelsey A ID: FAPKASG0105
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergrad Package Status: Completed Award Notification
 Packaging Plan ID: AWDPERASGS Retrieve Aggregate Source: Default Validate
 Repackaging Plan ID: Repackage Award Period: Both Post Reset

Award | Status

#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	900000000301	Fed Stafford Loan-Sub Add On	2,625.00	2,625.00	AS	08	Disbursement +
20		UGRD	900000000302	Fed Stafford Loan-Unsub Add On	3,400.00	3,400.00	AS	08	Disbursement +
30		UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	Disbursement +
40		UGRD	900000000210	ACG1_SEM	750.00	750.00	AS	XX	Disbursement +
50		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement +
60		UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement +
70		UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement +
80		UGRD	900000000305	Unsub Staff Sem	600.00	600.00	AS	01	Disbursement +

Student Aid Package page with a custom split for the ACG1_SEM award

To view the disbursement detail for this example, access the Award Disbursement Detail page (click the Disbursement link on the Student Aid Package page).

Award Disbursement Detail

Sequence: 30 Item Type: 900000000210 Net Award Amount: \$750.00
 Disbursement Plan: AS *Split Code: XX ☐ Custom Split

Disbursement Distribution Customize | Find | First 1-4 of 4 Last

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U0	375.00	375.00	375.00	0.00
02	0590	Academic	U0	375.00	375.00	375.00	0.00
03	0600	Academic	U0	0.00	0.00	0.00	0.00
04	0605	Non Std	U0	0.00	0.00	0.00	0.00

Award Disbursement Detail page

This Award Disbursement Detail page shows that the ACG1 award spans the leading summer and fall terms.

Awarding ACG or SMART Grants for Trailing Summer Period (Auto Package)

This example shows that the student was batch packaged initially with an Academic Award Period packaging plan, which resulted in the student being awarded the ACG2 award. The student was then auto packaged with a Nonstandard Trailing Summer Packaging plan, which resulted in the SMART1 Grant being awarded for the trailing summer term.

Access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package).

Student Aid Package

Need Summary

Term Summary

Apuicong, Glenda A

ID: FAPKASG0147

Aid Year: 2008

Federal Aid Year 2007 - 2008

Institution: PSUNV

Career: UGRD Undergrad

Package Status: Completed

Award Notification

Packaging Plan ID: TRAIL_ASG Retrieve

Aggregate Source: Default Validate

Repackaging Plan ID: Repackage

Award Period: Both

Post

Reset

Award

Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	01	Disbursement +
20		UGRD	900000000211	ACG2_SEM	1,300.00	1,300.00	AS	01	Disbursement +
30		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement +
40		UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement +
50		UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement +
60		UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	AS	01	Disbursement +
70		UGRD	900000000305	Unsub Staff Sem	2,640.00	2,640.00	AS	01	Disbursement +
80		UGRD	900000000212	SMART1_SEM	2,000.00	2,000.00	AS	09	Disbursement +
90		UGRD	900000000301	Fed Stafford Loan-Sub Add On	2,000.00	2,000.00	AS	09	Disbursement +
100		UGRD	900000000302	Fed Stafford Loan-Unsub Add On	2,360.00	2,360.00	AS	09	Disbursement +

Student Aid Package page

To view the disbursement detail for this example, access the Award Disbursement Detail page (click the Disbursement link on the Student Aid Package page).

Award Disbursement Detail

Sequence: 20

Item Type: 900000000211

Net Award Amount: \$1,300.00

Disbursement Plan: AS

*Split Code: 01 Custom Split

Disbursement Distribution

Customize Find

First 1-4 of 4 Last

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	0585	Non Std	U2	0.00	0.00	0.00	0.00
02	0590	Academic	U2	650.00	650.00	650.00	0.00
03	0600	Academic	U2	650.00	650.00	650.00	0.00
04	0605	Non Std	U2	0.00	0.00	0.00	0.00


Award Disbursement Detail page for Sequence 20


This Award Disbursement Detail page shows that the ACG2_SEM (Sequence 20) award spans only the Academic Award Period terms.

Access the Award Disbursement Detail page for the SMART grant.

Award Disbursement Detail

Sequence: 80 Item Type: 900000000212 Net Award Amount: \$2,000.00

Disbursement Plan: AS *Split Code: 09  ☐ Custom Split

Disbursement Distribution								Customize	Find		First	1-4 of 4	Last
Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed						
01	0585	Non Std	U3	0.00	0.00	0.00	0.00						
02	0590	Academic	U3	0.00	0.00	0.00	0.00						
03	0600	Academic	U3	0.00	0.00	0.00	0.00						
04	0605	Non Std	U3	2,000.00	2,000.00	2,000.00	0.00						

Award Disbursement Detail page for Sequence 80

This Award Disbursement Detail page shows that the SMART1_SEM (Sequence 80) award spans only the Trailing Summer Nonstandard Award Period term.

Overriding an ACG or SMART Award through Professional Judgement

When you award ACG and SMART awards to students through the Professional Judgement (PJ) page:

- The system uses the ACG/SMART HERA academic level tied to the Financial Aid Item Type setup to make an ACG or SMART award.
- You can award multiple ACG or SMART awards to a student regardless of the student's true ACG/SMART eligibility.
- An ACG/SMART Eligibility Record is not required.
- The HERA Academic Level on the FA Term record for ACG or /SMART awards is not required.
- The system considers no other ACG/SMART eligibility edits, such as FA Term Beginning of Term (BOT) level or FA Term Load.

This section describes how to award ACG and SMART grants using Professional Judgement.

See Also

Chapter 28, "Awarding and Packaging Students," Using Professional Judgement, page 1008

Page Used to Award ACG and SMART Grants Using Professional Judgement

Page Name	Definition Name	Navigation	Usage
Professional Judgement	STDNT_AWARD_ENTRY4	Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement	Use professional Judgement to override all ACG/SMART eligibility rules (including federal and aggregate rules) except for fiscal limits.

Awarding ACG and SMART Grants Using Professional Judgement

Access the Professional Judgement page (Financial Aid, Awards, Award Processing, Invoke Professional Judgement, Professional Judgement). Select the Award tab.

Professional Judgement | Need Summary | Term Summary

Huleron, Helena M ID: FAPKASG0099
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UENG Ugrad Engr Package Status: Applied Award Notification
 Packaging Plan ID: Retrieve Aggregate Source: Default Validate
 Repackaging Plan ID: Repackage Award Period: Both Post Reset

Award		Status							
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	
10		UENG	900000000214	ACG1_QTR	750.00	0.00	02	01	Disbursement +
20		UENG	900000000215	ACG2_QTR	1,300.00	0.00	02	01	Disbursement +
30		UENG	900000000216	SMART1_QTR	4,000.00	0.00	02	01	Disbursement +
40		UENG	900000000217	SMART2_QTR	4,000.00	0.00	02	01	Disbursement +

Professional Judgement page: Award tab

The four ACG and SMART awards are not subject to ACG/SMART eligibility limits.

Select the Status tab.

Professional Judgement Need Summary Term Summary

Huieron, Helena M ID: FAPKASG0099 Institution: PSUNV

Aid Year: 2008 Federal Aid Year 2007 - 2008

Career: UENG Ugrad Engr Package Status: Applied Award Notification

Packaging Plan ID: Retrieve Aggregate Source: Default Validate

Repackaging Plan ID: Repackage Award Period: Both Post Reset

Award		Status											
Nbr	Action	Career	Item Type	PJ	EA	Lock	Need Override	Override	Charge	Priority	Status		
10		UENG	900000000214	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		Offered		
20		UENG	900000000215	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		Offered		
30		UENG	900000000216	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		Offered		
40		UENG	900000000217	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FINAID		Offered		

Professional Judgement page: Status tab

The four awards are marked as assigned through Professional Judgement.

Repackaging Pell, ACG, and SMART Grants

Both auto repackaging and batch repackaging can re-evaluate the student for continued ACG/SMART eligibility. An existing ACG or SMART award can be increased, decreased, or remain the same. If a student was not previously awarded an ACG or SMART award and now demonstrates eligibility, the student is awarded the corresponding ACG or SMART award.

For the system to apply disbursement protection rules to ACG and SMART awards, an Even Split Option tied to the Disbursement Split Code Formula of the award must be established.

Note. If you click the Validate button on the Student Aid Package page, the system only re-evaluates the given award amount for continued eligibility, and never increases the amount of that award.

This section provides an overview of re-evaluation of Pell, ACG, and SMART grants and describes how to repackaging Pell, ACG, and SMART grants.

Understanding the Re-evaluation of Pell, ACG, and SMART Grants

When you apply the Repackaging plan to your students, the system repackages in the following order:

1. Pell
2. ACG1
3. ACG2
4. SMART1
5. SMART2
6. SMART3

That is, the processing rules always place ACG awards after Pell Grants, and SMART awards after ACG awards.

The most efficient method for repackaging students for Pell Grant, ACG, and SMART awards is to use a series of Validate Item Type Repackaging rules. The system re-evaluates the student's eligibility for each award and increases or decreases the awards based on continued eligibility. An example for setting up an ACG/SMART Repackaging Plan is in Setting Up ACG and SMART Grants chapter.

If the student was not previously awarded a Pell Grant or ACG/SMART award as part of an existing package and is now eligible for either award, the Validate Item Type Repackaging rules insert a new award accordingly.

Pages Used to Repackage Pell, ACG, and SMART Grants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Aid Package	STDNT_AWARD_ENTRY3	Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package	Use for manual, auto, or auto select packaging. Auto Packaging and Auto Select Packaging can be combined with manual awarding in the same awarding session.
Disburse Aid	STDNT_DISB_PROCESS	Financial Aid, Disbursement, Disburse Aid	Authorize and disburse aid manually for a single student, one award at a time.
ACG/SMART Grant Eligibility	SFA_ASG_ELIG	Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility	Review and update student grant eligibility records.

Repackaging a Pell, ACG, or SMART Award

This example demonstrates how the system repackages a student for a Pell Grant and an ACG award. In this example, the student has a Pell Grant of 3,660 USD and an ACG1 award of 750 USD as part of an initial package as a freshman. The fall term is disbursed for 375 USD, and the disbursed amount is disbursement-protected.

Pell Grant and ACG Awards

Access the Student Aid Package page (Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package).

Student Aid Package

Need Summary

Term Summary

Berone,Kelsey A

Aid Year: 2008

Federal Aid Year 2007 - 2008

ID: FAPKASG0025

Institution: PSUNV

Career: UGRD

Undergrad

Package Status: Completed

Award Notification

Packaging Plan ID: FED_ASG_SM

Retrieve

Aggregate Source: Default

Validate

Repackaging Plan ID:

Repackage

Award Period: Both

Post

Reset

Award

Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	XX	Disbursement
20		UGRD	900000000210	ACG1_SEM	750.00	750.00	01	01	Disbursement
60		UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	Disbursement
70		UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	Disbursement
80		UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	Disbursement
90		UGRD	900000000304	Sub Staff - Sem	2,625.00	2,625.00	01	01	Disbursement
100		UGRD	900000000305	Unsub Staff Sem	4,000.00	4,000.00	01	01	Disbursement

Pell Grant and ACG Award, Student Aid Package page

This page displays the student's initial set of awards.

Fall Term Disbursement Details

Access the Disburse Aid page (Financial Aid, Disbursement, Disburse Aid).

Disburse Aid

Kelsey Berone

Aid Year: 2008

Financial Aid Year 2007 - 2008

Term: 0590

2007 Fall

ID: FAPKASG0025

Institution: PSUNV

Career: Undergrad

Term Disbursements

Find | View All

First

3-4 of 6

Last

Item Type:	900000000210 ACG1_SEM	Disb ID:	01	Fall	Disb Date:	08/20/2007
Accepted:	\$375.00	Authorized:	\$375.00			
Net Disb Bal:	\$375.00	Disbursed:	\$375.00			

Authorization

Disbursement

Messages

Disburse Aid page

This page shows that the disbursed amount for ACG1 for the fall 2007 term is 375 USD.

Access the ACG/SMART Grant Eligibility page (Financial Aid, ACG/SMART Grants, ACG/SMART Grant Eligibility, ACG/SMART Grant Eligibility).

ACG/SMART Grant Eligibility		Comments				
Kelsey Berone		ID: FAPKASG0025				
Institution: PSUNV		Grant Type: Academic Competitiveness				
Aid Year: 2008		Term: 2007 Fall				
Find View All First 1 of 1 Last						
Ovrd	Eligibility Status: Eligible	Status Date: 07/19/07 10:20:52AM				
<input type="checkbox"/>	HERA Student Level: 1st Year - Never Attended	Seq Nbr: 1				
	Eligibility Reason: AP/IB	Source: User <input checked="" type="checkbox"/> Disbursement Protection				
	High School Program: AL0001	Other Information Financial Aid Status External Education Student Program Term History NSLDS Inquiry Award Summary FA Term Transfer Credit - Manual HERA Level				
	CIP Code:					
<input type="checkbox"/>	GPA:					
Messages Details						
<table border="1"> <thead> <tr> <th>DateTime</th> <th>Message Text</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> </tr> </tbody> </table>		DateTime	Message Text	1		
DateTime	Message Text					
1						

ACG/SMART Grant Eligibility page

This page shows that the ACG1 award is disbursement protected for the fall term.

Change in Student's Grade Level

The student has now advanced to the next grade level, sophomore. The Student Aid Package page displays the result of the re-evaluation if the student is re-evaluated using the ASG_RPKG Repackaging plan at the sophomore level.

Student Aid Package Need Summary Term Summary

Berone,Kelsey A ID: FAPKASG0025
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergrad Package Status: Completed Award Notification
 Packaging Plan ID: FED_ASG_SM Retrieve Aggregate Source: Default Validate
 Repackaging Plan ID: ASG_RPKG Repackage Award Period: Both Post Reset

Award		Status											
#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code					
10	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	3,660.00	3,660.00	01	00	01	Disbursement		+	
20	<input type="checkbox"/>	UGRD	900000000210	ACG1_SEM	375.00	375.00	01	01	01	Disbursement Message		+	
21	<input type="checkbox"/>	UGRD	900000000211	ACG2_SEM	650.00	650.00	01	01	01	Disbursement		+	
22	<input checked="" type="checkbox"/>	UGRD	900000000212	SMART1_SEM	0.00	0.00	01	01	01	Disbursement Message		+	
23	<input checked="" type="checkbox"/>	UGRD	900000000213	SMART2_SEM	0.00	0.00	01	01	01	Disbursement Message		+	
30	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	01	Disbursement		+	
40	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	3,600.00	3,600.00	01	01	01	Disbursement		+	
50	<input type="checkbox"/>	UGRD	900000000322	Perkins Loan - ELO	4,000.00	4,000.00	01	01	01	Disbursement		+	
60	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	2,625.00	2,625.00	01	01	01	Disbursement		+	
70	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	3,790.00	3,790.00	01	01	01	Disbursement Message		+	

Student Aid Package page, sophomore level repackaging

In this example, after repackaging the student as a sophomore, the student's eligibility for a Pell Grant (sequence 10) remains the same at 3,660 USD. However, the ACG1 award gets reduced to 375 USD (sequence 20), which reflects the disbursement-protected amount. The student gains eligibility for an ACG2 award at 650 USD for the spring term. ACG2 is inserted immediately following the ACG1 award at sequence 21. The student has no eligibility for a SMART1 award (sequence 22) or a SMART2 award (sequence 23). The remainder of the package is validated, and the awards remain the same.

Originating ACG and SMART Grants to COD

This section provides an overview of COD reporting and discusses how to:

- Originate ACG and SMART records.
- Use originated ACG and SMART records.
- View origination actions.
- View messages for rejected origination records.
- View disbursement information for originated grants.
- View disbursement action details.
- View disbursement messages.
- Resolve ACG and SMART outbound errors.
- Process mid-year changes and rejected records.

See Also

Chapter 46, "Using Common Origination and Disbursement," page 1747

Understanding COD Reporting

The following steps summarize the ACG and SMART grant creation and COD reporting process.

1. Institutions determine which students are eligible to receive ACG and SMART grants. Student eligibility information is stored in the ACG/SMART Eligibility pages.
2. Institutions award eligible students using item types with the Federal ID values of ACG and SMART.
3. The grant origination process (FAPASORG) creates an origination record for each student. These can be viewed in the Manage ACG/Smart Grants component.
4. The Generate ACG/SMART Outbound process (ASGOUT) populates the COD staging tables using data from the grant application tables. The process validates that the required data is present and then moves the data to the staging tables. The common record XML file is created.
5. Institutions assign the appropriate grant message class name and transmit the files to COD.
6. Institutions receive and process acknowledgement records. The Common Origination and Disbursement Inbound process (CODIN) loads Common Records from the XML file into staging tables. The process populates the grant origination tables using data from the COD staging table.
7. If the award is modified, adjustments to originated grants are automatically triggered or can be triggered manually from the Manage ACG/Smart Grants component.

Pages Used to Originate ACG and SMART Grants to COD

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Originate ACG/SMART Grants	SSFA_RUN_ASG_ORG	Financial Aid, ACG/SMART Grants, Originate ACG/SMART Grants	Originate ACG and SMART records.
Origination	SFS_ASG_ORIG	Financial Aid, ACG/SMART Grants, Manage ACG/SMART Grants, Origination	View and modify originated ACG and SMART records.
ACG/SMART Grants Origination Action Detail	SFA_ASG_ORIG_SEC	Click the Orig Status link on the Origination page.	View origination level action transactions.
ACG/SMART Grants Origination Messages	SFA_ASG_ORGMSG_SEC	Click the Message link for the selected row on the ACG/SMART Grants Origination Action Detail page.	View award level messages.

Page Name	Definition Name	Navigation	Usage
Disbursement	SFA_ASG_DISB	Financial Aid, ACG/SMART Grants, Manage ACG/SMART Grants, Disbursement	View disbursement information for originated grants.
ACG/SMART Grants Disbursement Action Detail	SFA_ASG_DISB_SEC	Click the Action Detail link on the Disbursement page.	View disbursement action transactions.
ACG/SMART Grants Disbursement Messages	SFA_ASG_DSBMSG_SEC	Click the Message link for the selected disbursement action row on the ACG/SMART Grants Disbursement Action Detail page.	View disbursement messages.
ACG/SMART Outbound	SFA_RUNCTL_AS_OUT	Financial Aid, File Management, COD Full Participant, Generate ACG/SMART Data, ACG/SMART Outbound	Generate outbound common origination records for transmission to COD.
COD Document	SFA_COD_DOCUMENT	Financial Aid, File Management, COD Full Participant, View COD Data, COD Document	View COD data stored in the COD staging tables.
Common Origination and Disbursement Inbound	SFA_RUNCTL_COD_INB	Financial Aid, File Management, COD Full Participant, Import COD Response Data	Load and process COD response XML files.

Originating ACG and SMART Records

Access the Originate ACG/SMART Grants page (Financial Aid, ACG/SMART Grants, Originate ACG/SMART Grants).

Originate ACG/Smart Grants page

The FAPASORG process selects records that meet the run control criteria for students who are awarded an ACG or SMART grant.

- Institution** Select the academic institution of the records to be processed.
- Aid Year** Select the aid year of the records to be processed.
- Reporting School Code** Select the owning school code used for Pell.
- Student Override** Select to allow individual students to be selected for origination.
- ID** Available when the student override check box is activated. Select the EmplID of the individual records to originate. The records selected must meet the criteria defined on the page.

Using Originated ACG and SMART Records

Access the Origination page (Financial Aid, ACG/SMART Grants, Manage ACG/SMART Grants, Origination).

The screenshot displays the 'Origination' tab of a web application. At the top, there are two tabs: 'Origination' (selected) and 'Disbursement'. Below the tabs, the student information is shown: 'Test1, Student' with ID 'FAASG001'. The 'Aid Year' is '2008' for 'Financial Aid Year 2007 - 2008'. The 'Item Type' is '900000000401 Federal ACG Grant 2'. The 'Institution' is 'PSUNV' and the 'Career' is 'UGRD'. The 'Award ID' is '758910001A08001315001'. The 'Grant Type' is 'ACG'. There is a checkbox for 'Update Origination' and a link for 'Orig Status'. The 'Reporting School Code' is '001315'. The 'Origination Status' is 'Accepted' with a timestamp of '05/13/2007 11:00:24AM'. The 'COD Transmit Status' is 'Ready' with a timestamp of '05/14/2007 6:12:20PM'. The 'MRR Status' is empty. At the bottom, there is a table with columns: Seq, Trans Nbr, Award Amt, Student Lvl, Enrollment Dt, Elig Reason Cd, HS Program Cd, Program CIP Cd, and Citizen Ovr. The table has one row with the following values: 1, 1, \$1300.00, 2nd year, 08/30/2007, HS Prog, CA0002, and empty cells for Program CIP Cd and Citizen Ovr. Navigation links like 'Customize', 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible above the table.

Seq	Trans Nbr	Award Amt	Student Lvl	Enrollment Dt	Elig Reason Cd	HS Program Cd	Program CIP Cd	Citizen Ovr
1	1	\$1300.00	2nd year	08/30/2007	HS Prog	CA0002		

Origination page

Use this page to view and update originated grant records. After the record is transmitted, the current row in the grid cannot be updated. To insert a new row, select the Update Origination check box.

Award ID Displays the unique ID generated by the origination process.

Grant Type Displays *ACG* or *SMART*.

Update Origination	<p>Select to run the origination process again for the same award. Use when a non-award related change must be made to the originated record.</p> <p>For award changes such as changes to the award amount, or changes to the individual disbursement amounts, modifying the award in the packaging components causes the origination process to select the record for adjustment.</p>
Orig Status (origination status)	Click this link to access the ACG/SMART Grants Origination Action Detail page, which displays all actions that have occurred at the origination level.
Reporting School Code	Displays the CPS school code used for COD reporting.
Origination Status	<p>Displays the origination status when the system transmits records. Values are:</p> <p><i>Accepted</i>: Indicates an accepted acknowledgment record.</p> <p><i>Cancelled</i>: Indicates a cancelled award from the system.</p> <p><i>Change to Origination</i>: Indicates that a change was made to the student's origination record. The origination program sets this status.</p> <p><i>Corrected</i>: Indicates an accepted record with corrections.</p> <p><i>Originated</i>: Indicates that the origination process ran successfully. This is also set manually for rejected records that are now ready to be processed.</p> <p><i>Rejected</i>: Indicates a rejected record.</p>
COD Transmit Status	<p>Displays the transmission status of the record by COD. The values are normally assigned automatically as the grant is processed, but you can manually change values as needed. Values are</p> <p><i>Review</i>: Not used.</p> <p><i>On Hold</i>: Set when the rejected by COD. This must be reset to Ready to retransmit to COD.</p> <p><i>Ready</i>: Default status set after the record has been originated. This is also set manually for rejected records that are now ready to be processed.</p> <p><i>Transmitted</i>: Set after the COD message has been generated.</p> <p><i>Cancel</i>: Set when the origination status is set to <i>Cancelled</i>.</p>

MRR Status (multiple reporting record status)	<p>Displays originations and disbursements reported by more than one institution for the same student. Use this information to identify and resolve potential overaward payments and concurrent enrollments before they occur.</p> <p>When you request multiple reporting records and load them into the system, the status of the data updates this field.</p> <p>Values are:</p> <p><i>Blocked Institution</i></p> <p><i>Blocked and Concurrent</i></p> <p><i>Blocker Institution</i></p> <p><i>Blocker/Concurrent Enrlm</i> (blocker and concurrent enrollment).</p> <p><i>Concurrent Enrollment Institution</i></p> <p><i>Disbursed Institution</i></p> <p><i>None Found</i></p> <p><i>Originated Institution.</i></p> <p><i>Shared SAR ID</i> (shared student aid report ID).</p> <p><i>Unblocked Institution</i></p> <p><i>Verification W</i></p>
Seq (sequence)	Displays the internal counter.
Trans Nbr (transaction number)	Displays the transaction number of the current valid ISIR.
Award Amount	Displays the total amount awarded for the award year for the item type.
Student Lvl (student level)	Displays the student's academic level. The academic level must be valid for the specific grant program.
Enrollment Data	Displays the first day of enrollment for the award period.
Eligibility Reason Code	<p>Select the reason the student is eligible for ACG. This field can be updated only if the grant type is ACG. Values are:</p> <p><i>HS Prog</i> (high school program): Student has completed an eligible high school program accepted by the Department of Education.</p> <p><i>AP/IB</i> (advanced placement or international baccalaureate): Student has completed advanced placement or international baccalaureate course work with acceptable scores.</p> <p><i>Course</i>: Student has completed the high school course work necessary to satisfy the ACG curriculum requirements.</p>
HS Program Cd (high school program code)	This field can be updated only if the grant type is ACG. When the Eligibility Reason Code is <i>HS Prog</i> , the appropriate high school program code must be provided.

Program CIP Cd This field can be updated only if the grant type is SMART. For SMART grants, (program classification of instructional program code) provide the eligible CIP code.

Citizenship Override Select to report a local override of the student's citizenship status.

Viewing Origination Actions

Access the ACG/SMART Grants Origination Action Detail page (click the Orig Status link on the Origination page).

ACG/SMART Grants Origination Action Detail

Item Type900000000400ACG GRANT

Award Amount:\$700.00

CustomizeFind

First 1-5 of 5 Last

Seq	Origination Action	Date	Document ID		User ID
1	Originated	10/23/2006 5:25:41PM		Message	PS
2	Origination Transmitted	10/25/2006 7:20:23PM	2006-10-25T19:20:19.6276543210	Message	PS
3	Orig Ackn Rejected	10/31/2006 5:23:28PM	2006-10-25T19:20:19.6276543210	Message	PS
4	Origination Transmitted	11/02/2006 11:43:44AM	2006-11-02T11:38:48.6076543210	Message	PS
5	Orig Acknowledgement Received	11/02/2006 1:16:39PM	2006-11-02T11:38:48.6076543210	Message	PS

ACG/SMART Grants Origination Action Detail page

This page displays the actions that have occurred at the origination level. COD document data and COD edit messages can be accessed from this page.

Document ID Click this link to view the COD staging table data.

Message Click this link to view any error messages generated by the grant processes or received from COD.

Viewing Messages for Rejected Origination Records

Access the ACG/SMART Grants Origination Messages page (click the Message link for the selected row on the ACG/SMART Grants Origination Action Detail page).

ACG/SMART Grants Origination Messages

Action Seq: 3 **Action Code:** Orig Ackn Rejected **Date:** 11/28/2006 2:38:54PM

Document ID: 2006-11-28T14:10:32.2476543210

Customize | Find | First 1-2 of 2 Last

Seq	Origination Action Message
1	Unnecessary High School Program Code.
2	School must print/provide the disclosure statement unless it sends disbursement data to COD at least 5 days before the first disbursement date.

ACG/SMART Grants Origination Messages page

The page displays action messages received from a rejected origination record.

Viewing Disbursement Information for Originated Grants

Access the Disbursement page (Financial Aid, ACG/SMART Grants, Manage ACG/SMART Grants, Disbursement).

Origination | **Disbursement**

Eberhart,Katie A ID: FA0861

Aid Year: 2007 Financial Aid Year 2006 - 2007 **Institution:** PSUNV

Item Type: 900000000400 ACG GRANT **Career:** UGRD

Customize | Find | View All | First 1-2 of 2 Last

Disbursement Detail | COD Info

Disb ID	Seq Nbr	Disb Amt	Disb Dt	Disb Status	Disb Stat Date	Awd Period	Pmt Start Dt	
01	1	350.00	08/18/2006	Disbursed	11/02/2006		08/30/2006	Action Detail
02	2	350.00	01/12/2007	Originated	11/01/2006		01/24/2007	Action Detail

Disbursement page

The page displays disbursement information on the Disbursement Detail tab and COD information on the COD Info tab.

Viewing Disbursement Action Details

Access the ACG/SMART Grants Disbursement Action Detail page (click the Orig Status link on the Origination page).


ACG/SMART Grants Disbursement Action Detail


Item Type: 9000000000400

Disb ID: 01

Disb Amount: \$350.00

Seq Nbr: 1

Customize | Find | 

First  1-5 of 5  Last

Seq	Disbursement Action	Date	Document ID		User ID
1	Originated	10/23/06 5:25:41PM		Message	PS
2	Originated	11/01/06 6:58:37PM		Message	PS
3	Disbursement Outbound Error	11/02/06 11:25:36AM	2006-11-02T11:21:31.2576543210	Message	PS
4	Disbursement Transmitted	11/02/06 12:37:57PM	2006-11-02T11:38:48.6076543210	Message	PS
5	Disbursement Acknowledged	11/02/06 1:23:49PM	2006-11-02T11:38:48.6076543210	Message	PS

ACG/SMART Grants Disbursement Action Detail page

Document ID Click this link to view the COD staging table data.

Message Click this link to view any disbursement level messages generated by the grant processes or received from COD.

Viewing Disbursement Messages

Access the ACG/SMART Grants Disbursement Messages page (click the Message link for the selected disbursement action row on the ACG/SMART Grants Disbursement Action Detail page).

ACG/SMART Grants Disbursement Messages		
Action Seq: 3	Action Code: Disbursement Outbound Error	Date: 11/28/2006 2:10:33PM
Document ID:		
Customize Find First 1 of 1 Last		
Seq	Disbursement Action Message	
1	Disbursement not transmitted due to the Award not being disbursed to Student Financials for the Disb Id.	

ACG/SMART Grants Disbursement Messages page

This page displays disbursement action messages generated by the outbound process.

Resolving ACG and SMART Outbound Errors

Similar to the Pell reporting process, the outbound process can fail to generate an XML record for a student if an award discrepancy exists or required fields are missing. When an originated record fails the outbound process, an error message displays in the ACG/SMART Grants Origination Action Detail page.

The two types of problems to be resolved are:

- Award discrepancy.
- Incomplete origination record.

When the amount of the grant in the student's package is greater than the amount originated, first determine which value is correct. If the packaged amount is correct, run the record through the origination process again to synchronize the award amounts.

When a required field for the grant is missing, identify the failed originated records by reviewing the message log for the FAPASOUT process. Here is an example message log:

Process

Instance:

613

Type:

COBOL SQL

Name:

FAPASOUT

Description:

COD ACG/SMART Outbound

Customize

Find

View All

First

1-20 of 20

Last

Severity	Log Time	Message Text	Explain
10	10:52:35AM	FAPASOUT : Begin Execution at 10.52.34.130000 on 2006-11-27	Explain
10	10:52:35AM	FAPASOOR : Begin Execution at 10.52.35.220000 on 2006-11-27	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG001, Institution=PSUNV, Aid Year=2007, Award ID=758910001A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG002, Institution=PSUNV, Aid Year=2007, Award ID=758910011A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG003, Institution=PSUNV, Aid Year=2007, Award ID=758910021A07001315001	Explain
10	10:52:35AM	FAPASOOR: One of more required fields are blank for ID=FAASG008, Institution=PSUNV, Aid Year=2007, Award ID=758910022S07001315001	Explain
10	10:52:35AM	FAPASOOR: Total Number of Records Read 4	Explain
10	10:52:35AM	FAPASOOR: Total Number of Records Processed 0	Explain
10	10:52:35AM	FAPASOOR : End Execution at 10.52.35.350000 on 2006-11-27	Explain
10	10:52:35AM	FAPASODB : Begin Execution at 10.52.35.420000 on 2006-11-27	Explain

Message log for the FAPASOUT process

Then review each record in the Manage ACG/SMART component.

Identifying Records by Query

Alternatively, you can identify originated records by executing the following query:

```

SELECT
A.EMPLID,
A.SFA_ASG_GRANT_TYPE,
A.SFA_ASG_ORIG_STAT,
A.SFA_COD_TRANS_STAT,
B.SFA_ASG_ORIG_SEQ,
B.SFA_COD_STDNT_LVL,
B.SFA_COD_ELIGRSN_CD,
B.SFA_COD_HS_PROG_CD,
B.SFA_COD_PROGCIP_CD
FROM PS_SFA_ASG_ORG A, PS_SFA_ASG_ORG_DTL B
WHERE A.EMPLID = B.EMPLID AND
A.INSTITUTION = B.INSTITUTION AND
A.AID_YEAR = B.AID_YEAR AND
A.ACAD_CAREER = B.ACAD_CAREER AND
A.ITEM_TYPE = B.ITEM_TYPE AND
A.SFA_ASG_ORIG_STAT IN ( 'O', 'U' ) AND
A.SFA_COD_TRANS_STAT = 'R'

```

Check the following fields for missing information required for the grant type:

- SFA_COD_STDNT_LVL (student academic level)
- SFA_COD_ELIGRSN_CD (ACG eligibility reason)
- SFA_COD_HS_PROG_CD (ACG eligible high school program)
- SFA_COD_PROGCIP_CD (SMART eligible CIP code)

Enter this information in the Manage ACG/SMART Grants component. Rerun the ASGOUT process to generate the COD file.

Processing Mid-Year Changes and Rejected Records

When a student's grant eligibility increases mid year because the student advanced a grade level, a separate item type for each grade level amount must be used. This is because COD does not accept more than one grade level for the same origination record. In this case, separate origination records are reported.

This section discusses how to:

- Resolve origination records rejected by COD.
- Adjust changed records.

Resolving Origination Records Rejected by COD

If an origination record is rejected, the processing of the acknowledgement record from COD sets the ACG/SMART Origination Status to *Rejected* and the COD Transmit Status to *On Hold* on the Origination page.

To resolve, first review the reasons the record was rejected and any origination or disbursement level messages received from COD. Then make changes to the student's data on the Origination page to correct the problem:

- If changing the student's eligibility information, such as student level, ACG eligibility reason code, high school program code, or CIP code, make the changes and update the Origination Status from *Rejected* to *Originated* and reset the COD Transmit Status from *On-Hold* to *Ready*. When you run the ACG/SMART Outbound process, the record is retransmitted.
- If changing the award or disbursement amounts, re-originate the record. First, update the student's award. The award is flagged for adjustment processing; similar to loan processing, the offer activity indicator field for the award is reset. Next, update the Origination Status from *Rejected* to *Originated* and reset the COD Transmit Status from *On-Hold* to *Ready* and run the origination process. Run the ACG/SMART Outbound process to generate the new file.

Warning! The Origination Status and COD Transmit Status fields must be updated before a rejected record can be processed.

Adjusting Changed Records

After COD has accepted a grant record, changes in eligibility may occur and must be reported. When a change to the student's award amount occurs, these records are automatically selected and adjusted by the origination process.

If a change to the student's eligibility information (ACG eligibility reason code, high school program code, or CIP code) is required, make the change to the student's grant eligibility record. Select the record representing the first term of the origination record in the Manage ACG/SMART Grants component, select the *Update Origination* check box and run the origination process. A new row is inserted in the origination detail grid in which you can view the modified eligibility criteria.

Changes in the student's academic level are not allowed after COD has accepted a grant, and so the origination process does not allow the HERA level to be changed. However, you can cancel the current origination record and re-originate the grant using a different item type for the new level.

After disbursement to the student, any subsequent change to the disbursement amount is not reported until the adjusted amount has been run through the disbursement process.

Disbursing ACG and SMART Grants

This section provides an overview of disbursement processing and discusses how to validate ACG and SMART grants.

Understanding Disbursement Processing for ACG and SMART Grants

The disbursement authorization process complies with Federal regulations for disbursing ACG and SMART grant funds to students:

- The disbursement authorization process verifies for ACG and SMART grant item types that eligibility has been established in the ACG/SMART Grant Eligibility component. The current status for the same grant type and term must be Eligible. Any other value results in an authorization error.
- The authorization process verifies that the academic level in the eligibility record matches the level assigned to the item type, which is a new field in the Financial Aid Item Type component. If the values do not match, the award fails authorization.

- Item type disbursement authorization rules for ACG and SMART grants. Institutions are required to create item type disbursement rules for every ACG and SMART item type regardless of whether they use any of the new disbursement rules.

Validating ACG and SMART Grants

ACG and SMART grants are authorized for disbursement with the following validations:

- Validations of awards not yet authorized.

The item type academic level and eligibility status validations are run. If the validation fails, the log indicates an error and the process moves to the next award.

- Validation of canceled awards.

If an ACG or SMART award was authorized or disbursed, the authorization process bypasses the item type academic level and eligibility status validations.

- Validation of awards already disbursed.

If an ACG or SMART award was disbursed before and is being reauthorized, then only the item type academic level validation is performed. If the validation fails, the log indicates an error and the process moves to the next award.

- Validation of prior authorized award that was not a cancellation.

If the award has was authorized, but not canceled, then item type academic level and eligibility status validations are enforced. If the validation fails, the log indicates an error and the process continues to the user-defined validation rules. If the core validation rule fails, then the authorization amount is reset to zero.

Creating ACG and SMART COD Reports

This section provides an overview of ACG and SMART data requests and discusses how to:

- Define an ACG or SMART data request.
- Generate ACG or SMART data request files.
- Load COD files.
- Process multiple reporting records.
- Review students for origination and transmit status.

Understanding an ACG or SMART Data Request

Use the data request record to request acknowledgment batch replacement, multiple reporting, Statement of Account, year-to-date information, and reconciliation. You can also use the data request record to receive reporting information for multiple students for whom you originate awards and who might also have awards originated at other institutions.

After you select the type of data request and run the process, the data request files are sent to COD. COD responds by sending the requested information using the appropriate message class.

Pages Used to Create ACG and SMART COD Reports

Page Name	Definition Name	Navigation	Usage
ACG/SMART Data Request	SFA_ASG_DATA_REQST	Financial Aid, File Management, ACG/SMART Grants, COD Data Request, ACG/SMART Data Request	Define an ACG/SMART data request.
FA Inbound	RUNCTL_FA_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load Federal data files into staging tables.
ACG/SMART Data Request Outbound	SFA_RUNCTL_ASG_DR	Financial Aid, File Management, ACG/SMART Grants, Outbound Data Request, ACG/SMART Data Request Outbound	Generate ACG or SMART Data Request files.
ACG/SMART Multiple Reporting	SFA_RUNCTL_ASG_MR	Financial Aid, File Management, ACG/SMART Grants, Import Multiple Reporting Data, ACG/SMART Multiple Reporting	Update MRR status of originated grant records.
Origination	SFA_ASG_ORIG	Financial Aid, ACG/SMART Grants, Manage ACG/SMART Grants, Origination	View updated MRR status information on originated grant records.
ACG/SMART Header, ACG/SMART Data Request, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_DREQ_EC, SFA_ASG_TRAILER_EC	Financial Aid, File Management, ACG/SMART Grants, Review Data Request Records	View data request file information for ACG and SMART grants.
ACG/SMART Header, ACG/SMART Multiple Report, ACG/SMART Institution Info, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_MRR_EC, SFA_ASG_MRR_EC_INS, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Multiple Reporting, Review MRR	View loaded MRR file data.
ACG/SMART Header, ACG/SMART Reconciliation, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_REC_EC, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Cash Management Reports, Review Reconciliation	View loaded reconciliation file data.

Page Name	Definition Name	Navigation	Usage
ACG/SMART Header, ACG/SMART ESOA Summary,ACG/SMART ESOA Detail, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_SAR_EC, SFA_ASG_SARD_EC, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Cash Management Reports, Review Statement of Account	View loaded Statement of Account file data.
ACG/SMART Header, ACG/SMART Originations, ACG/SMART Disbursements, ACG/SMART Summary, ACG/SMART Trailer	SFA_ASG_HEADER_EC, SFA_ASG_YTDORG_EC, SFA_ASG_YTDDSB_EC, SFA_ASG_YTDSUM_EC, SFA_ASG_TRAILER_EC	Financial Aid, ACG/SMART Grants, Year to Date Reports, Review YTD Records	View loaded Year To Date file data.
YTD Origination All Recipients	SFA_ASG_871_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Originations	Generate a list of students who are in an origination year-to-date file sent by COD.
YTD Origination Errors	SFA_ASG_872_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Origination Errors	Review conflicting information from COD and your application tables.
YTD Disb All Recipients	SFA_ASG_873_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Disbursements	Generate a list of students who have been disbursed as of the year to date.
YTD Disbursement Errors	SFA_ASG_874_RPT	Financial Aid, ACG/SMART Grants, Year to Date Reports, YTD Disbursement Errors	Review conflicting information from COD and your application tables.
ACG/SMART MRR Batch Report	SFA_ASG_875_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR By Batch	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific batches.
ACG/SMART MRR by Status Code	SFA_ASG_875B_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR By Status	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific Status codes. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.

Page Name	Definition Name	Navigation	Usage
ACG/SMART MRR Report	SFA_ASG_875A_RPT	Financial Aid, ACG/SMART Grants, Multiple Reporting, MRR Report	Review and monitor POP (potential overaward payment) and Blocked Institution situation. Use after the MRR inbound file is imported and the ACG/SMART Multiple Reporting process has been run.
ACG/SMART ESOA	SFA_ASG_870_RPT	Financial Aid, ACG/SMART Grants, Cash Management Reports, ACG/SMART ESOA	Review and monitor ACG and SMART grant fund allocations.
ACG/SMART Reconciliation Report	SFA_ASG_923_RPT	Financial Aid, ACG/SMART Grants, Cash Management Reports, Reconciliation Report	Review records reconciled with COD.
ACG/SMART Origination Status	SFA_ASG_876_RPT	Financial Aid, ACG/SMART Grants, Origination Status Report, ACG/SMART Origination Status	Review and monitor students in selected Origination Status and COD Transmit Status values.

Defining an ACG or SMART Data Request

Access the ACG/SMART Data Request page (Financial Aid, File Management, ACG/SMART Grants, COD Data Request, ACG/SMART Data Request).

ACG SMART Data Request page

To select multiple ACG and SMART Grants requests, use the Add (+) button to add more rows.

Request Type

Select the type of information report. Values are:

ACG Multiple Reporting: Select to activate the Multiple Report Request Code 1 list and the Multiple Report Requests Code 2 list.

ACG Reconciliation Request: Select to receive reconciliation information.

ACG Statement of Accounts: Select to receive your funding levels and transactions with GAPS.

ACG Year-To-Date: Select to receive a summary of how many originations and disbursements COD sent out and how many rejects and message codes you received based on year-to-date.

SMART Multiple Reporting: Select to activate the Multiple Report Request Code 1 list and the Multiple Report Requests Code 2 list.

SMART Reconciliation Request: Select to receive reconciliation information.

SMART Statement of Accounts: Select to receive your funding levels and transactions with GAPS.

SMART Year-To-Date: Select to receive a summary of how many originations and disbursements COD sent out and how many rejects and message codes you received based on year-to-date.

Multiple Report Request Code 1

For multiple reporting only. Select *Disbursed Records* or *Originated Records*. For example, to determine whether a student or all students are conflicting with other schools, base the request on disbursements to see if another school has disbursed to a student.

Multiple Report Request Code 2	Select <i>All Students</i> , <i>Selected Institution</i> , or <i>Selected Students</i> . Restrict the number of students reported by COD by selecting the appropriate option.
YTD Request ID	Available when <i>ACG Year-To-Date</i> or <i>SMART Year-To-Date</i> is selected in the Request Type field. Click to list students for whom you want year-to-date data.
Institution	Available when <i>Selected Institution</i> is selected in the Multiple Report Request Code 2 field. Click to request multiple reporting from other institutions. You can select the institution for which you are requesting data.
Student	Available when <i>Selected Students</i> is selected in the Multiple Report Request Code 2 field. Click to request multiple reporting by student.

Generating ACG or SMART Data Request Files

Access the ACG/SMART Data Request Outbound page (Financial Aid, File Management, ACG/SMART Grants, Outbound Data Request, ACG/SMART Data Request Outbound).

ACG/SMART Data Request Outbound page

Use this page to run the ASGRQ process that creates and stores the requested information at the location you enter.

Loading COD Files

COD sends report files based on the data request files submitted by the institution. COD files can be multiple reporting, reconciliation, Statement of Accounts, and year-to-date files.

Use the FA Inbound process (RUNCTL_FA_INBOUND) to load these files into the COD report inbound staging tables. The FA Inbound process determines the type of file based on the content of the Batch ID field in the header.

Use the provided inquiry pages to view the file data. Use the search record for these pages to search by EC Transaction ID, where the values match the file message classes. The field value is derived from the Batch ID by the FA Inbound process and is not intended to match the name of the physical file.

Processing Multiple Reporting Records (MRR)

Access the ACG/SMART Multiple Reporting page (Financial Aid, File Management, ACG/SMART Grants, Import Multiple Reporting Data).



ACG/SMART Multiple Reporting

Run Control ID: audits [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameters

☒ ACG/SMART Multiple Reporting Record

ACG/SMART Multiple Reporting page

Use this page to run the FAPASIMR process to update MRR status information for any originated grant records.

Select the ACG/SMART Multiple Reporting Record check box to process ACG and SMART MRR files.

Reviewing Students for Origination and Transmit Status

Access the ACG/SMART Origination Status page (Financial Aid, ACG/SMART Grants, Origination Status Report, ACG/SMART Origination Status).



ACG/SMART Origination Status

Run Control ID: PS [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameters

Institution: PSUNV  PeopleSoft University

Aid Year: 2008  Financial Aid Year 2007 - 2008

Origination Status: Accepted ▼

Transmit Status: Ready ▼

ACG/SMART Origination Status page

Use this page to review and monitor students who have selected COD origination status and COD transmit status values.

Origination Status: Select the origination status. Values are:

- Accepted*
- Cancelled*
- Change to Orig* (change to origination)
- Corrected*
- Originated*
- Rejected*
- Transmitted*

Transmit Status: Select the transmit status. Values are:

- Cancel*
- On Hold*
- Ready*
- Review*
- Transmitted.*

Chapter 40

Using Perkins MPN Functionality

This section provides an overview of Perkins Master Promissory Note (MPN) functionality and discusses how to:

- Determine a valid Perkins MPN.
- Print the Perkins MPN.
- Track Perkins MPN information.
- View Perkins MPN data.

Understanding Perkins MPN Functionality

Regulatory changes require that institutions must use the Perkins MPN for new Perkins loans and for former National Direct Student Loan borrowers made on or after November 1, 2004. The Perkins MPN functionality enables institutions to participate as an annual MPN or multi-year MPN school by tracking a signed MPN before a student can receive any Perkins loan funds. For the annual MPN, the borrower is required to sign a note once each award year for all loans made for that award year. For a multi-year MPN, the borrower signs a note once for all loans made until that note expires at your institution.

In addition to providing annual or multi-year options, the system provides institutions the means to offer students the option of completing and signing an electronic Perkins MPN (eMPN). PeopleSoft Self Service provides students multiple entry points to begin the process to complete and electronically sign the Perkins MPN. Perkins MPN notifications and disclosures are incorporated into the Perkins electronic MPN process. The Perkins eMPN process incorporates the guidance and recommendations in accordance with the Department of Education Federal Student Aid.

The system provides a way to track the date that the MPN was signed by the borrower, the date that the MPN was received by the school, the date that the school received a request from the student to cancel an MPN, and the expiration date. Schools can close the status of the expiration date on the Perkins MPN record if they receive a written request from the student to cancel additional multi-year MPN loans.

Schools can print and track Perkins MPNs by groups, career, or for a single student. They can control printing of MPNs at the time of award notification (offered award status) or after the student has accepted their Perkins loan award. They can select a sort order when printing for large groups of students. The print MPN process utilizes the Forms Engine routine.

The disbursement authorization process accommodates the Perkins MPN record and process, but you must ensure that the MPN requirement flag is set at the financial aid item type level. For the financial aid item types that are flagged, the disbursement authorization process assesses whether or not a student with a Perkins Loan award satisfies the MPN requirement.

Note. This process does not require a checklist to be established for funds to be disbursed. See "Changes to Authorization and Disbursement for Perkins MPN Awards" in this document.

Determining a Valid Perkins MPN

The Perkins eMPN self-service process, print Perkins MPN process, and disbursement authorization process all need to determine whether a student who is awarded a financial aid item type with the MPN required flag has a valid Perkins MPN on file to proceed. Each process determines whether a valid Perkins MPN is on file for the student by first checking for the type of MPN. If it is a multi-year note or an annual note, and is signed and not expired, the process determines that a valid MPN exists. If it is a multi-year or annual note and is signed but expired, the process determines that a valid MPN does not exist and proceeds appropriately. The expiration date is based on any one of the following:

- The date that the institution receives the borrower's written request for no additional MPN loans.
- Twelve months after the signature date if no disbursements were made under that MPN.
- Ten years after the signature date or the date of institution's receipt of MPN.

Printing the Perkins MPN

This process utilizes the Forms Engine routine. The Forms Engine's primary function is to enable high speed and high volume printing to PostScript printers. The print Perkins MPN process sends the student data directly to the printer, which prints out to the Perkins MPN form layout, based on the department approved note, dated August 2003. This section discusses how to print the Perkins MPN.

Page Used to Print Perkins MPN

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print Perkins Master Promissory Note	SFA_RUN_PERK_MPN	Financial Aid, Loans, Print Perkins MPN, Print Perkins Master Promissory Note	Generate the Perkins MPN.

Printing the Perkins MPN

Access the Print Perkins Master Promissory Note page (Financial Aid, Loans, Print Perkins MPN, Print Perkins Master Promissory Note).

Print Perkins Master Promissory Note

Run Control ID: CAN [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria Find | View All First 1 of 1 Last

*Institution: PSUNV *Printer Name: WBUR-PRINT-02IP06-Professor ☐ Print Via Script

*Aid Year: 2006 Sort by: Name

Career: UGRD

☒ Student Override

ID	Name
FAPK0350	Silverstein, Colleen A

Print Perkins Master Promissory Note page

- Sort by** Select from the following to determine the order that the system prints the MPN:
- ID*: Select to print by student EmplID.
 - Name*: Select to print by student names. The order is last name, first name, middle initial.
 - SSN*: Select to print by student social security numbers.
- Printer Name** Select the printer for which you want to print the MPN. See the Using Forms Engine chapter for more information about defining printers.
- Print Via Script** Select to allow for multi-platform printing. See the Using Forms Engine chapter for more information about defining printers.
- Student Override** Select this check box and an individual student ID to print a Perkins MPN. The search result only displays students with a financial aid item type with the MPN Required flag and an award status of *Offer* or *Accept*. The process does not allow you to select students who at a minimum do not have an offered Perkins financial aid item type with the MPN Required check box selected on the FA Item Type 1 page.

Tracking Perkins MPN Information

This section provides an overview of Perkins MPN information and discusses how to:

- View Perkins MPN information.
- Review and enter data.
- Review and enter references.

Understanding Tracking Perkins MPN Information

The Perkins MPN record tracks and records key dates and information. The system creates a Perkins MPN record if a student has been awarded a financial aid item type with the MPN Required flag and under the following conditions:

1. The MPN format is electronic and the student has completed and electronically signed the Perkins MPN.
2. A paper MPN has been generated. You can generate paper MPNs in batch by running the Print Perkins MPN process or a student can request a paper MPN within the eMPN process.

Pages Used to Track Perkins MPN Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tracking Information	SFA_PERK_MPN_TRACK	Financial Aid, Loans, View Perkins MPN, Tracking Information	View Perkins MPN information.
Data Fields	SFA_PERK_MPN_DATA	Financial Aid, Loans, View Perkins MPN, Data Fields	View borrower and school information. Reprint Perkins promissory note.
References	SFA_PERK_MPN_REFER	Financial Aid, Loans, View Perkins MPN, References	Manually enter MPN reference information or view information captured from the Perkins eMPN process.

Viewing Perkins MPN Information

Access the Tracking Information page (Financial Aid, Loans, View Perkins MPN, Tracking Information).

Tracking Information		Data Fields	References
ID:	FAPK0350	Silverstein, Colleen A	
Institution:	PSUNV		
MPN Seq:	1		
MPN Information			
MPN Type:	Multi-Year	MPN Expire Date:	
MPN Format:	Paper	MPN Closed Date:	<input type="text"/> 31
Created Date:	06/16/2005 10:49:41AM		
Aid Year:	2006		
Signature Date:	<input type="text"/>		31
Received Date:	<input type="text"/>		31
Canceled Date:	<input type="text"/>		31

Tracking Information page

MPN Seq (master promissory note sequence)	Displays the sequence number. The sequence number tracks the number of times the system created an MPN record.
MPN Type (master promissory note type)	Displays the option (annual or multi-year) the institution selected.
MPN Format (master promissory note format)	Displays the format that the system used to create the MPN.
Created Date	Displays the date on which the system created the note.
Aid Year	Displays the aid year in which the system generated the record.
Signature Date	Displays the date on which the borrower signed the note.
Consent Date	Displays the date on which the borrower acknowledged consent to electronically sign the MPN. The consent date appears only for MPNs signed electronically.
Received Date	Displays the date on which the school received the master promissory note.
Canceled Date	Displays the date on which the borrower cancelled the loan. You (administrative user) can update this field to cancel loans that may have inadvertently been created, or if the loan was cancelled after the note was generated. After you update the Canceled Date field and save, the data on the record becomes display only. This allows you to account for that note, but it does not prohibit you from generating a new note if required. Because sequence number is a key, the system generates new notes provided that the student does not have a valid MPN on record.

MPN Expire Date

(master promissory note
expire date)

Displays the expiration date for a multi-year MPN. This is required only for schools that are using the multi-year note. The expiration date is based any one of the following federal definitions:

- Date the school receives borrower's written request for no additional MPN loans.
- Twelve months after signature date if no disbursements are made under the eMPN.
- Ten years after signature date or date of school's receipt of the MPN.

Note. The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the MPN Expire Date to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the MPN Expire Date to ten years after the signature date.

MPN Closed Date

(master promissory note
closed date)

Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Reviewing and Entering Data

Access the Data Fields page (Financial Aid, Loans, View Perkins MPN, Data Fields).

Tracking Information		Data Fields		References	
ID:	FAPK0350	Silverstein, Colleen A			
Institution:	PSUNV				
MPN Seq:	1				
Section A: Borrower Section					
Last Name:	Silverstein	Social Security Number:	865-98-1652		
First Name:	Colleen	Date of Birth:	12/19/1982		
Middle Initial:	M	Phone Number:	503/282-7403		
Address 1:	2415 Ne 32Nd Court		Driver's License State:		
Address 2:			Driver's License Number:		
City:	Portland	OR	97212		
Section B: School Section					
Name:	Berger Institute		Annual Interest Rate:	5.000	
Address 1:	15821 Ventura Blvd.				
Address 2:					
City:	Parklin	CA	91436		
*Printer Name:	<input type="text"/>		<input type="checkbox"/> Print Via Script	Reprint Promissory Note	

Data Fields page

Printer Name	Select the printer from which you want to print the MPN.
Print Via Script	Select to allow for multi platform printing. You should select this check box if you are printing from a UNIX application server or process scheduler environment.
Reprint Promissory Note	Click to reprint the promissory note. You must provide a printer name prior to invoking this process.

Reviewing and Entering References

Access the References page (Financial Aid, Loans, View Perkins MPN, References).

Reference Information					
ID:	FAPK0350	Silverstein, Colleen A			
Institution:	PSUNV				
MPN Seq:	1				
Name:	Johnston, Williams				
Relationship:	Employer				
Telephone:	510/789-1234				
Country:	USA United States				
Address:	3784 Fillmore Fremont, CA 93842				
Employer:	Henning Company				

References page

Use this page to enter reference information required for students who have been awarded a Perkins loan. You can insert rows based on the number of references required by your institution. If the system created the Perkins MPN record based on the Perkins eMPN process, the system posts the reference information that the student entered using self service.

Viewing Perkins MPN Data

You can view Perkins MPN data from several pages within the system. This section discusses how to:

- View Perkins MPN loan indebtedness information.
- View MPN information and loan history.
- View Perkins MPN dates, history, and repayment schedules.

Pages Used to View Perkins Loan Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Perkins Loan Indebtedness	SFA_PERK_MPN_INDEB	Financial Aid, Loans, View Perkins Loan Indebtedness, Perkins Loan Indebtedness	Review the MPN type, format, dates, and loan indebtedness history that the student has incurred at your institution.
Financial Aid - Financial Aid Status	SS_FA_AU_STATUS	Financial Aid, View Financial Aid Status, Financial Aid - Financial Aid Status	Review packaging status summary, checklist, communications, comments, and FA term information. Access Perkins MPN detail.
Perkins MPN	SFA_PERK_MPN_SEC	Click the Perkins MPN link on the Financial Aid Status page.	Review Perkins MPN information, loan history, and sample repayment schedules.

Viewing Perkins MPN Loan Indebtedness Information

Access the Perkins Loan Indebtedness page (Financial Aid, Loans, View Perkins Loan Indebtedness, Perkins Loan Indebtedness).

Perkins Loan Indebtedness

ID: FAPK0350 Silverstein, Colleen A

Institution: PSUNV

MPN Seq: 1

MPN Information	
MPN Type:	Multi-Year
MPN Format:	Paper
Created Date:	06/16/2005 10:49:41AM
Signature Date:	06/16/2005
MPN Expire Date:	06/16/2015
MPN Closed Date:	

Loan History

Aid Year	Expected Award	Perkins Loan Amount
2004	2000.00	\$2,000.00
2005	900.00	\$900.00
2006	4000.00	\$0.00
Total Loan Indebtedness:	6900.00	\$2,900.00

Perkins Loan Indebtedness page

This page provides the key MPN dates along with the student's detailed Perkins loan indebtedness history at your institution.

MPN Information

MPN Type (master promissory note type) Displays the option (annual or multi-year) the institution selected.

MPN Format (master promissory note format) Displays the format.

Created Date Displays the date on which the system generated the note.

Signature Date Displays the date on which the borrower signed the note.

MPN Expire Date
(master promissory note
expire date)

Displays the expiration date for a multi-year MPN. This is only required for schools who are using the multi-year note. The expiration date is based on any one of the following federal definitions:

- The date that the school receives the borrower's written request for no additional MPN loans.
- Twelve months after the signature date if no disbursements are made under the MPN.
- Ten years after the signature date or the date of school's receipt of the MPN.

Note. The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the MPN Expire Date to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the MPN Expire Date to ten years after the signature date.

MPN Closed Date
(master promissory note
closed date)

Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Loan History

Aid Year

Displays the aid year for the expected and actual Perkins award.

Expected Award

Displays the expected Perkins award amount.

Actual Award

Displays the actual or disbursed Perkins award amount.

Note. The awards in the list are any financial aid item type where the aggregate area is tied to Perkins, even if the item type is not flagged as MPN required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts associated to valid school codes for the institution.

Viewing MPN Information and Loan History

Access Financial Aid - Financial Aid Status page (Financial Aid, View Financial Aid Status, Financial Aid - Financial Aid Status).

Financial Aid

Financial Aid Status

Silverstein, Colleen A

ID: FAPK0350

Aid Year:

Financial Aid Year 2005-2006

Institution:

PSUNV

National ID:

865981652

Campus ID:

Dependency:

Independent w/Primary EFC

EFC Status:

Unofficial

App Date:

10/26/2002

Cor Status:

Pending

Date:

Packaging Status Summary

Aid Application Status:

Active

Package Status:

Completed

SAP:

Undetrmine

Review Status:

Incomplete

INST Verification Status:

Non Select


Verification Flag:



Not Reqd

Verification Status:


Not Select


Checklists


Customize | Find | View All | 


First  1 of 1  Last

Item Code	Status Date	Description	Status

Communications				
Customize Find View All  First ◀ 1 of 1 ▶ Last				
Method	Date Completed	Direction	Letter Code	Description

Comments		
Customize Find View All  First ◀ 1 of 1 ▶ Last		
Category	Comment Date	Comment

FA Term Info			
Customize Find View All  First ◀ 1-2 of 2 ▶ Last			
Term	Career	Academic Plan	NSLDS Loan Year
0560	UGRD	UNDECL-UG	1st Year - Previously Attended
0550	UGRD	UNDECL-UG	1st Year - Previously Attended

Student Groups	
Customize Find View All  First ◀ 1 of 1 ▶ Last	
Group Name	Description

[TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [Pell Information](#)
[Request Counselor Action](#) [Award Notification](#) [Financial Aid Awarded](#) [Perkins MPN](#)

Financial Aid - Financial Aid Status page (2 of 2)

EFC Status (expected family contribution status) Displayed from the financial aid application data. The student's EFC can be: *Official, Rejected, or Unofficial.*

Packaging Status Summary

Aid Application Status Indicates whether the student's financial aid application is available for financial aid processing.

(none): You have not assigned the student's financial aid application a status. You cannot access certain pages until you enter a status.

Active: The student's financial aid application is active for financial aid processing. The system assigns this value automatically when you load the student's first ISIR into the system.

Canceled: You have canceled the student's financial aid application. You must enter this value manually.

Restricted: The student has applied for restricted aid only. You must enter this value manually.

Package Status Indicates where the student is in the Awarding process.

SAP (satisfactory academic progress) Indicates whether the student is meeting satisfactory academic progress (SAP).

Review Status	<p>Indicates the status of the review if your institution conducts a review of the student's financial aid application.</p> <p><i>(none)</i>: Indicates that your institution does not conduct a review.</p> <p><i>Complete</i>: The review of this application has been completed.</p> <p><i>Incomplete</i>: This application is awaiting a review.</p>
INST Verification Status (institutional verification status)	<p>Indicates the status of your verification process if your institution conducts a verification of the student's financial aid application.</p> <p><i>(none)</i>: Indicates that your institution does not conduct an institutional verification.</p> <p><i>Doc Select</i>: The student has been selected for institution verification of a document only.</p> <p><i>Non Select</i>: The student has not been selected for institutional verification.</p> <p><i>Select</i>: The student has been selected for institutional verification.</p>
Verification Flag	<p>Indicates the status of the Department of Education's verification requirement for this student.</p>
Verification Status	<p>Indicates the status of your verification process if your institution conducts a verification of the student's financial aid application. Values are:</p> <p><i>Accurate</i>: Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually.</p> <p><i>Calculated</i>: Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed.</p> <p><i>Not Select</i>: The student was not selected for verification.</p> <p><i>Not Verfd</i> (not verified): Indicates that a student was selected for verification but was not verified.</p> <p><i>Reprocess</i>: Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01.</p> <p><i>Tolerance</i>: Indicates that a student's verification passed within the tolerance level.</p> <p><i>Wtht Doc</i> (without documentation): Indicates that the first Pell payment was made to the student before verification was completed. You can only use this value for one Pell payment. Subsequent payments/disbursements require reporting a different verification status.</p>

Checklists

Item Code	<p>Displays the code for a particular checklist item. For example, <i>ACTSAT</i> can represent ACT and SAT 1 test scores.</p>
Status Date and Status	<p>Displays the status and status date of the checklist item: Values are <i>Initiated</i> or <i>Completed</i>.</p>

Description	Displays a description identifying the item code.
--------------------	---

Communications

Method	Displays the type of communication such as letters, email, phone calls, personal contact, facsimiles, and so on.
---------------	--

Direction	Displays the direction of the communication. For example, the communication is outgoing.
------------------	--

Letter Code	Displays a code associated with the context and function selected for this communication.
--------------------	---

Comments

Category	Displays the business need with which this comment is associated.
-----------------	---

Comment Date and Comment	Displays the date when the comment is entered.
---------------------------------	--

FA Term Info

The system displays the term, career, academic plan, and NSLDS loan year.

Student Groups

Group Name	Displays a student group such as <i>Athletes</i> .
-------------------	--

TERM	Click to access the Financial Aid Term page to view financial aid term information.
-------------	---

ISIR Information	Click to access the ISIR Information page to view some of the student's ISIR information.
-------------------------	---

Database Matches	Click to access the Database Matches page to review a student's status regarding the U.S.E.D. required database matches.
-------------------------	--

Need Summary	Click to access the Need Summary page to view the student's need summary information calculated with both federal and institutional methodologies.
---------------------	--

Pell Information	Click to access the PELL Information page to view Pell information or to initiate Pell Payment processing for a student if they have received a Pell Grant award.
-------------------------	---

Request Counselor Action	Click to access the Request Counselor Action page.
---------------------------------	--

- Award Notification** Click to access the FE Award Notification Detail page to view award status or print an award notification for an individual student.
- Financial Aid Awarded** Click to access the Financial Aid Awards page to view the student's financial aid awards.
- Perkins MPN** Click to access the Perkins MPN page to view MPN information and loan history.

Note. The system displays the Perkins MPN Required field without a link if the system determines that Perkins MPN is required and a Perkins MPN record does not exist.

Viewing Perkins MPN Dates, History, and Repayment Schedules

Access the Perkins MPN page (click the Perkins MPN link on the Financial Aid Status page).

Perkins MPN

ID: FAPK0350 Silverstein, Colleen A

Institution: PSUNV

MPN Seq: 1

MPN Information

MPN Type: Multi-Year

MPN Format: Paper

Created Date: 06/16/2005 10:49:41AM

Signature Date: 06/16/2005

MPN Expire Date: 06/16/2015

MPN Closed Date:

Loan History

Aid Year	Expected Award	Perkins Loan Amount
2004	2000.00	\$2,000.00
2005	900.00	\$900.00
2006	4000.00	\$0.00
Total Loan Indebtedness:	6900.00	\$2,900.00

Perkins MPN page (1 of 2)

Sample Repayment Schedule			
Total Amount Borrowed	Monthly Payment	Interest Paid	Total Repaid
\$3,000.00	\$40.00	\$604.55	\$3,604.55
\$4,000.00	\$42.43	\$1,091.11	\$5,091.01
\$5,000.00	\$53.03	\$1,364.03	\$6,463.03
\$7,000.00	\$73.61	\$1,909.36	\$8,909.36
\$10,000.00	\$106.07	\$2,727.70	\$12,727.70
\$20,000.00	\$212.81	\$5,537.11	\$25,537.11
\$40,000.00	\$414.26	\$10,911.52	\$50,911.52

Perkins MPN page (2 of 2)

MPN Information

MPN Type (master promissory note type) Displays the option (annual or multi-year) that the institution selected.

MPN Format (master promissory note format) Displays the format.

Created Date Displays the date on which the system generated the note.

Signature Date Displays the date on which the borrower signed the note.

MPN Expire Date (master promissory note expire date) Displays the expiration date for a multi-year MPN. This is only required for schools who are using the multi-year note. The expiration date is based on any one of the following federal definitions:

- The date that the school receives borrower's written request for no additional MPN loans.
- Twelve months after the signature date if no disbursements are made under the MPN.
- Ten years after the signature date or the date of school's receipt of the MPN.

Note. The system maintains this field. The user does not update it. When the system updates a Perkins MPN signature date, it automatically sets the MPN Expire Date to twelve months after the signature date. After a disbursement has occurred, the system updates and changes the MPN Expire Date to ten years after the signature date.

MPN Closed Date (master promissory note closed date) Displays the date on which the school closed a loan based on the written request of the student to cancel further loans for the multi-year MPN.

Loan History

Aid Year	Displays the aid year and total indebtedness for the expected and actual award.
Expected Award	Displays the aid year and total indebtedness for the expected and actual award.
Expected Award	Displays the expected award amount.
Actual Award	Displays the actual award amount.

Note. The awards in the list are any financial aid item type where the aggregate area is tied to Perkins, even if the item type is not flagged as MPN required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts associated to valid school codes for the institution.

Sample Repayment Schedule

Total Amount Borrowed	Displays examples of a total amount borrowed.
Monthly Payment	Displays examples of a monthly payment based on the borrowed amount.
Interest Paid	Displays examples of the interest paid based on the borrowed amount.
Total Repaid	Displays examples of the amount repaid based on the borrowed amount.

Note. The information in the Sample Repayment Schedule group box cannot be changed or updated.

Chapter 41

Authorizing and Disbursing Financial Aid

This chapter provides an overview of authorizing and disbursing financial aid and discusses how to:

- Manage user edit messages.
- Run background authorization and disbursement.
- Disburse aid manually.
- Disburse aid with overrides.
- Review authorization and disbursement results.

Understanding Authorizing and Disbursing Financial Aid

This section lists prerequisites and discusses:

- Authorization and disbursement.
- Background authorization and disbursement.
- Online authorization and disbursement.
- Anticipated aid.
- Service impacts on disbursement authorization.

Prerequisites

Before you can authorize and disburse a student's aid, accepted financial aid awards must exist for the student. You must also set up global disbursement rules and financial aid item type disbursement rules for each eligible career before authorizing or disbursing awards.

See Also

[Chapter 15, "Setting Up Disbursement Rules," Defining Basic Global Rules for Authorization, page 449](#)

Authorization and Disbursement

After a student is awarded financial aid and accepts the award, you authorize each payment disbursement and disburse the money into the student's account. That is, disbursing financial aid to students includes two distinct steps:

1. The authorization process uses rules to determine whether a particular award can be disbursed to a student's account. The rules can be set up to apply to all students in a particular career or to particular awards for a career.
2. Disbursement is the transfer of funds from the Financial Aid system to the student's account in the PeopleSoft Enterprise Student Financials system.

Financial aid awards can appear on the student's account:

- Before disbursement, as anticipated aid on a student's account.
- After disbursement, as actual awards credited to the student's account.

See Also

PeopleSoft Enterprise Student Financials 9.0 PeopleBook, "Maintaining Receivables," Entering Groups of Transactions

Background Authorization and Disbursement

Financial Aid enables you to authorize and disburse aid to individual students or to a group of students. You authorize and disburse aid for a group of students using two background (batch) processes:

1. Authorize awards using background authorization.
 - Use the authorization calendar and background authorization run control page to determine which accepted awards are processed.
 - The background authorization process uses the global disbursement rules and any item type disbursement rules that you set up for the disbursement process, using the award's disbursement date to select the valid effective-dated global rules to enforce, item-type rules to enforce, or both.
 - You can run the authorization process first in test mode to identify potential unauthorized disbursements. After resolving problems by making changes to student records, you can run the process again in update mode.
2. Disburse awards using background disbursement.
 - Authorized awards defined in the disbursement calendar are selected for the batch disbursement process.

Use the background disbursement run control page to further control the records to be processed.
 - Awards that are authorized online but not disbursed online are included in the batch disbursement.
 - Awards for which the authorized amount equals the current disbursed amount are skipped.

Online Authorization and Disbursement

Authorization and disbursement can be done online for individual students and the disbursement process immediately credits the student's account. If the authorization of an award is not successful, the system provides a message explaining each failure. You can revise the student's record and attempt to authorize the award again. If you are unable to authorize an award and want to override the rules that are set up for the career and the award, you can access another page and authorize the award using an override. Authorizing with an override should be done only in very special circumstances because after the award has been authorized, it is easily disbursed. An award can be disbursed only after it is successfully authorized.

Warning! When financial aid is disbursed in batch from PeopleSoft Financial Aid, it appears in Financial Aid pages as if the funds have been applied to the students' accounts. This is not true. The students' accounts are not actually credited until Student Financials Posting processes apply the funds to the students' accounts. The scheduling of batch disbursement processing should be coordinated with the student financial office to ensure that aid is promptly applied to the students' accounts.

Note. The *online* authorization and disbursement processes do *not* use the authorization and disbursement calendars. Security for the online authorization and disbursement pages should be closely controlled because aid can be disbursed at any time in the aid year.

Anticipated Aid

When you define financial aid item types, you choose whether the award should be reflected on a student's account in PeopleSoft Student Financials as anticipated aid prior to disbursement. Anticipated aid is financial aid that you have awarded but not disbursed to a student.

You can view anticipated aid for a student in one of two ways:

- Use the Anticipated Aid by Term page to view the anticipated financial aid for the student, by term, for a designated aid year.

You can use this page to determine which awards in each term have yet to be disbursed to a student. A net award amount of zero indicates that the award has been disbursed.

- Use the Anticipated Aid by Item Type page to view a student's anticipated financial aid for a particular term by financial aid item type.

See Also

Chapter 34, "Reviewing Awards," Reviewing Anticipated Aid, page 1213

Service Impacts on Disbursement Authorization

You can use service impacts to prevent disbursement of financial aid funds. Disbursement authorization verifies whether an active service indicator exists for the disbursement term. If the service indicator has been assigned a service impact intended to stop the disbursement of funds, the item type fails authorization. Generally, negative service indicators should be used to hold disbursements.

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators," Viewing, Assigning, or Removing Service Indicators

Managing User Edit Messages

User edit messages are financial aid office communication records that can be assigned to students for a given aid year. Financial aid offices can use these messages to track financial aid-related events for a student to supplement (or to use as an alternative to) the Campus Community 3C's communication records.

To withhold the disbursement of financial aid funds, assign message codes to global or item type disbursement rules in user edit messages. User edit messages are assigned manually, or automatically in the NSLDS Transfer Monitoring Alert file process.

This section discusses how to assign user edit messages.

See Also




Chapter 15, "Setting Up Disbursement Rules," Defining User Edit Messages, page 445

Page Used to Assign User Edit Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review User Edit Messages	STDNT_FA_EDIT_MSGS	<ul style="list-style-type: none"> Financial Aid, Disbursement, Maintain User Edit Messages, Review User Edit Messages Financial Aid, Awards, Maintain User Edit Messages, Review User Edit Messages 	Assign new user edit messages or update existing ones for a student for a given aid year and term.

Assigning User Edit Messages

Access the Review User Edit Messages page (Financial Aid, Disbursement, Maintain User Edit Messages, Review User Edit Messages).

Thomas Mcchistry		ID:	FA0602	  
Aid Year:	2008	Financial Aid Year 2007 - 2008	Institution:	PSUNV

Find View All First 1 of 1 Last				
'Msg Type:	Error	'Msg Code:	UNIT01	Term Units Less Than Full Time Message Detail + -
Msg Dt/Tm:	10/16/2008 10:00:57.000000PM	'Term:	0590 2007 Fall	Msg Action:
				None Take
User ID:	PS	Student has a reduced load		
Dt Compl:	10/16/2008			

Review User Edit Messages page

Msg Type (message type)

Enter a message type. Values are:

Error: A severe message type category that indicates a problem that might necessitate halting financial aid processing for the student.

Informtnl (informational): Indicates a student event that has no effect on the student's financial aid processes.

Warning: Indicates a student event that might negatively affect the student's financial aid processes.

Msg Code (message code)

After a message type is selected, the available message codes are limited to those with a matching message type.

Msg Dt/Tm (message date and time)

Displays the date and time that the record was first assigned.

Term

Enter the term for which the user edit message applies. This is a required field.

Msg Action (message action)

Enter the current action taken on the edit message. Values are *None Taken*, *Pending*, and *Resolved*. Edits set to a resolved status do not hold financial aid disbursements.

Process

User-defined field.

User ID

Displays the ID of the user who entered the record.

Dt Compl (date completed)

Displays the date that the Msg Action field is set.

Running Background Authorization and Disbursement

This section provides an overview of background authorization and disbursement, lists common elements, and discusses how to:

- Authorize financial aid in batch.

- Disburse financial aid in batch.

Understanding Background Authorization and Disbursement

In most situations, you run authorization and disbursement as background processes for all students who have not had their awards authorized or disbursed.

Before running these processes, ensure that all terms and careers are specified in your authorization and disbursement calendars and that all financial aid item types needed are correctly defined in the disbursement calendar. You can review a summary of your authorization calendar and disbursement calendar using the View Calendar Settings (DISB_AUTH_CAL_SMRY) component.

The background processes use the authorization and disbursement calendars and the Disbursement Date field on the Disbursement ID page to control whether awards can be disbursed. You can also use the Authorize Aid page and the Disburse Aid page to further refine the group of students and the financial aid item types. These pages provide more flexibility than using only the calendars and provide an improvement in performance.

Using these pages, you can redesign a background process previously defined by the disbursement and authorization calendars as a single run control with multiple rows that runs more efficiently. Also, a commit to the database occurs as each row of run parameters is processed, rather than waiting for the entire background process to finish.

The Term and Item Type fields on the Authorize Aid and Disburse Aid pages act as a filter against the criteria defined in the calendar. For example, you set up your disbursement calendar for aid year 2006 to select all valid terms and all item types. You can set up the batch authorization and disbursement processes to run for only one of the valid terms by creating a run control row that selects only that term. If you select specific financial aid item types for processing using the Item Type field, remember that:

- The authorization process allows any financial aid item type to be processed.
- The disbursement process processes only financial aid item types that are defined in the authorization and disbursement calendars.

If you do not use the Term and Item Type fields, use the authorization and disbursement calendars to define the records to be processed, and not the batch run settings on the Authorize Aid and Disburse Aid pages.

See Also

[Chapter 15, "Setting Up Disbursement Rules," Authorization and Disbursement Calendars, page 444](#)

Common Elements Used in This Section

Process Instance	Displays the unique identifying number assigned by Process Scheduler to each active row when the authorization process runs.
Run Date and Time	Displays the most recent date and time that the process has been run.

Pages Used to Run Background Authorization and Disbursement Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disbursement Calendar Summary	DISB_CAL_SUMRY	Financial Aid, Disbursement, View Calendar Settings, Disbursement Calendar Summary	Review your institution's disbursement calendar for a particular financial aid year by effective-dated row.
Authorize Calendar Summary	AUTH_CAL_SUMRY	Financial Aid, Disbursement, View Calendar Settings, Authorize Calendar Summary	Review your institution's authorization calendar for a particular financial aid year by effective-dated row.
Authorize Aid	RUNCTL_AUTHRIZE	Financial Aid, Disbursement, Process Award Authorizations, Authorize Aid	Authorize financial aid in batch by selecting records for authorization and then running the Background Mass Authorization process.
Disburse Aid	RUNCTL_DISBURSE	Financial Aid, Disbursement, Process Disbursements, Disburse Aid	Disburse financial aid in batch by selecting records to disburse and then running the Background Mass Disbursement process.

Authorizing Financial Aid in Batch

Access the Authorize Aid page (Financial Aid, Disbursement, Process Award Authorizations, Authorize Aid).

Authorize Aid

Run Control ID: 1

Report Manager

Process Monitor

Run

Run Control Parameters

Find | View All

First1 of 1Last

*Institution: PSUNVPeopleSoft University

☐ Active

*Aid Year: 2004Financial Aid Year 2003-2004

☒ Update Switch

☐ Process Selected Terms

☐ Process Selected Items

Select Terms

Customize | Find | View All

First1 of 1Last

Term
1

Select Item Types

Customize | Find | View All

First1 of 1Last

Item Type
1

Process Instance:

Run Date and Time:

Authorize Aid page

You can restrict the authorization process to specific terms and financial aid item types, as well as set up and process multiple institutions and aid years using the same run control ID. If you do not restrict the authorization process, the process evaluates all students defined in the authorization calendar that have awards with a status of *Accepted* (where the current disbursement amount does not match the current authorized amount—unless the reauthorize option is selected). The process then uses the global and financial aid item type disbursement rules to determine whether an award can be authorized. If an award requires manual authorization, you receive an error message during background processing.

- Active

Select to indicate that this row of settings can be processed. You can insert additional rows and have more than one aid year active at the same time. When you run the authorization process, all active rows are processed. The authorization process cannot update rows that have this check box cleared.
- Update Switch

Select to have the background authorization process update the database. To perform a test run of the authorization process, clear this check box.
- Select Awards in Offered Stat (select awards in offered status)

This check box is available when the Update Switch check box is cleared. Select to have the authorization process review only awards in *Offered* status. This option is available only when you are performing a test run so that you do not inadvertently authorize and disburse offered awards.
- Process Selected Terms

Select to authorize only selected terms instead of all terms defined for this aid year in the authorization calendar. If cleared, all terms defined in the authorization calendar are authorized.
- Term

List the terms defined in the authorization calendar for this aid year that you want to authorize. Only terms defined in the authorization calendar are available for selection.

Process Selected Items Select to process only selected financial aid item types instead of all financial aid item types.

Note. The authorization calendar does not define which financial aid item types to authorize. If you do not select this check box, all financial aid item types are processed.

Item Type Select the financial aid item types that you want to authorize.

Run Run the Background Mass Authorization process (FAPAUTHS) when you are ready to authorize students in batch.

Authorization results done in test mode can be viewed on the Student Authorize/Disburse page.

See [Chapter 41, "Authorizing and Disbursing Financial Aid," Reviewing Authorization and Disbursement Results, page 1642.](#)

See Also

[Chapter 5, "Setting Up Packaging Basics," Defining Disbursement and Anticipated Aid, page 123](#)

Disbursing Financial Aid in Batch

Access the Disburse Aid page (Financial Aid, Disbursement, Process Disbursements, Disburse Aid).

Disburse Aid

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Run Control Parameters Find | View All Run Control Parameters 1 of 1 Last

*Institution: PSUNV PeopleSoft University ☐ Active

*Aid Year: 2004 Financial Aid Year 2003-2004

☐ Honor Disbursement Date ☐ Process Selected Terms

Grace Period (Days): 0 ☐ Process Selected Items

Select Terms Customize | Find | View All | First 1 of 1 Last

Term
1

Select Item Types Customize | Find | View All | First 1 of 1 Last

Item Type
1

Process Instance: Run Date and Time:

Disburse Aid page

Only awards that have been authorized (but the disbursed amount does not match the authorized amount) are included in the batch for disbursement. You can restrict the disbursement process to specific terms and financial aid item types. You can also set up and process multiple institutions and aid years using the same run control ID.

Active	Select to indicate that this row is active for the current aid year. You can insert additional rows and have more than one aid year active at the same time. The disbursement process skips rows that have this check box cleared.
Honor Disbursement Date	Select to have the disbursement process compare the disbursement date on the Disbursement ID page against the current date for all selected financial aid item types. The process disburses only those awards that have a disbursement date that is earlier than or equal to the current date. Use the Grace Period (Days) field to allow disbursement dates within a specified number of days to be disbursed as well.
Grace Period (Days)	<p>This field is available only if you select the Honor Disbursement Date check box. Enter a limit to the number of days before the disbursement date that funds can be processed for disbursement. For example, if you never want funds to be disbursed more than five days before the scheduled disbursement date, enter 5 in the field. If you want the disbursement date to be earlier than or equal to the current date without exception, enter 0 in this field.</p> <p>For example, assume that you are running the disbursement process on 09/11/00, and you want to process all awards with disbursement dates of 09/15/00 and earlier. You would enter 4 in this field for these disbursement dates to be processed.</p>
Process Selected Terms	Select to disburse only selected terms instead of all terms within the aid year.
Term	Enter the terms defined in the disbursement calendar for this aid year that you want to disburse.
Process Selected Items	<p>Select to disburse only selected financial aid item types instead of all the financial aid item types selected on the disbursement calendar.</p> <hr/> <p>Important! The financial aid item types that you select on the Disburse Aid page do not override the disbursement calendar settings. For example, if the disbursement calendar indicates that all financial aid item types except 900000000001 should be processed, and the Disburse Aid page specifies that only item type 900000000001 should be processed, then no disbursements are made.</p> <hr/>
Item Type	Select the financial aid item types that you want to disburse. Although all financial aid item types are available for selection in this field, only financial aid item types defined in the disbursement calendar are eligible for processing.
Run	Run the Background Mass Disbursement process (FAPDISBS) when you are ready to disburse aid in batch.

Disbursing Aid Manually

Although you generally run authorization and disbursement for large numbers of students as a background process, you can use the Disburse Aid page to authorize and disburse aid online for an individual student. You can authorize and disburse all of the aid for a term or for a particular award for the term. The page requires you to authorize each award individually.

This section discusses how to:

- Authorize and disburse aid manually.
- Review authorization and disbursement failure messages.

Pages Used to Disburse Aid Manually

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Disburse Aid	STDNT_DISB_PROCESS	Financial Aid, Disbursement, Disburse Aid, Disburse Aid	Authorize and disburse aid manually for a single student, one award at a time.
Disburse Aid - Message Detail	STDNT_DISB_MSG_SP	Click the Messages link on the Disburse Aid page or the Disburse Aid with Overrides page.	Review messages for authorization failure, disbursement failure, and disbursement success, as well as override messages.
Disburse Aid - Message Detail: Description	STDNT_DISB_MSG1_SP STDNT_DISB_MSG1	Click the Messages link on the Disburse Aid - Message Detail page or on the Student Authorize/Disburse page.	View further information about the displayed message.

Authorizing and Disbursing Aid Manually

Access the Disburse Aid page (Financial Aid, Disbursement, Disburse Aid, Disburse Aid).

Disburse Aid

Lamii Vigor

ID: FA0711

Aid Year: 2005 Financial Aid Year 2004-2005

Institution: PSUNV

Term: 0540 2005 Spring

Career: Undergrad

Term Disbursements				Find View All	First	1-2 of 3	Last	
Item Type:	900000000304 Sub Staff- Sem	Disb ID: 02	Spring	Disb Date: 01/14/2005				
Accepted:	\$1,312.00	Authorized:	\$0.00					
Net Disb Bal:	\$1,261.00	Disbursed:	\$0.00					
				Authorization		Disbursement		
Item Type:	900000000305 Unsub Staff Sem	Disb ID: 02	Spring	Disb Date: 01/14/2005				
Accepted:	\$0.00	Authorized:	\$0.00					
Net Disb Bal:	\$0.00	Disbursed:	\$0.00					
				Authorization		Disbursement		

Disburse Aid page

This page displays all of the student's financial aid awards for the selected term. The financial aid award must have a status of *Accepted* for the Authorization button to be available. The page shows awards by term, so you can disburse aid only for one term at a time. This can help prevent disbursing aid for subsequent terms unintentionally.

Disb ID (disbursement ID) Displays the disbursement ID for the award that falls within the selected term. If the award (such as a Direct Loan) has more than one disbursement that falls within the term, multiple disbursement IDs for the award are on this page.

Disb Date (disbursement date) Displays the date that the disbursement ID is scheduled for disbursement.

Accepted Displays the award amount that the student has accepted.

Authorized Displays the amount that has been authorized for disbursement for that disbursement ID. This amount is zero until you have successfully authorized the award, using either the Authorization button on this page or the background authorization process.

Net Disb Bal (net disbursement balance) Displays the net disbursement balance, which differs from the accepted amount if the actual amount that the student receives is reduced by any administrative fees. This situation occurs for many student loan programs. The amount reflects the net disbursement after fees are taken out.

Disbursed Displays the amount that has been disbursed to the student for that disbursement ID. This amount is zero until you have successfully disbursed the award, using either the Disbursement button on this page or the background disbursement process.

Authorization	Click to run the authorization process for the disbursement ID of a specific financial aid item type for the displayed term. Authorization uses global and financial aid item type disbursement rules to determine whether the award can be authorized. If authorization is not successful, the process generates a message explaining the reason for failure. If authorization fails, your institution's business processes determine whether any corrective action is required by the student, financial aid office, or another department to resolve the failure. After authorization is successful, the Disbursement button becomes available.
Disbursement	Click to disburse a specific financial aid item type for the term. This button is available for use only after successful authorization of the award. Click this button to start a disbursement program and send a <i>quick post</i> of funds to the student's account in PeopleSoft Student Financials. If the student does not already have a student account set up, sending the disbursement also establishes the student's account.
Messages	Click to access the Disburse Aid - Message Detail page and review messages for authorization failure, disbursement failure, and disbursement success. If authorization passes successfully, no messages appear.

Reviewing Authorization and Disbursement Failure Messages

Several loan types have special authorization rules that are not set up in the Global Disbursement (Disbursement Rules: Global - Indicators page) or Item Type (FA Item Type 5 page, Disbursement Rules: Item Type - Indicators, Groups/Thresholds, Checklists/Tracking) disbursement rules setup pages.

Messages for these special loan item types and missing term data are described in this section.

Error Messages for FFEL, Direct, and Alternative Loan Item Types

The authorization process checks the LOAN_STDNT_AWD record to verify that funds have been received for the student. If funds have not been received, the following authorization error message is sent: Funds for this disbursement have not been recorded in the system.

After funds have been received by electronic roster or by manual entry in the CommonLine Disbursement Maintenance page, the authorization process can reevaluate the item type.

You cannot use the Disburse Aid with Override page to override this authorization error.

Error Messages for ACG and SMART Grant Item Types

The disbursement authorization process verifies for ACG and SMART grant item types that eligibility has been established in the ACG/SMART Grant Eligibility component. The current status for the same grant type and term must be *Eligible*. Any other value results in an authorization error message.

The authorization process verifies that the academic level in the eligibility record matches the level assigned to the item type, which is a new field in the Financial Aid Item Type component. If the values do not match, the award fails authorization and an authorization error message is logged.

Error Messages for Perkins Loan Item Types

If a Perkins loan item type is set up in the Financial Aid Item Type page to require a completed master promissory note, the authorization process checks whether the requirement has been met. If not, one of these error messages is sent:

- A valid Perkins MPN is required to authorize the loan.

This message indicates that either the school has not yet generated a Perkins MPN or the school generated the Perkins MPN but has not yet signed and received it.

- Perkins MPN setup for this institution is incomplete or missing.

This message indicates that setup information for Perkins MPN processing has been altered or deleted.

You cannot use the Disburse Aid with Override page to override this authorization error.

Error Message for Missing Term Data

If you manually change a student's career, program, or both in the Financial Aid Term record and do not populate all corresponding fields in that record, you create a condition that prevents disbursements from occurring. Packaging the student with missing term data causes the STDNT_AWRD_DISB field to be incomplete.

When you attempt to disburse any monies, you receive the error message: *Fatal Error - Business Unit Not Passed*. This indicates that the business unit is missing from the STDNT_AWRD_DISB field. The STDNT_AWRD_DISB field is populated as part of the Financial Aid Term record and then propagated to the student award table as a result of award posting.

To resolve this error, you must populate the Financial Aid Term record completely, post the student's awards, and then authorize and disburse the aid.

Disbursing Aid with Overrides

If you want to disburse the student's award even though it has failed authorization, you can use the Disburse Aid with Override page to override the authorization rules. Disbursing aid by overriding the authorization rules should be done only in special cases.

Warning! Because the Disburse Aid with Override page enables you to override both the global and financial aid item type disbursement rules, you might want to limit the number of users who have access to this page.

This section discusses how to authorize and disburse aid using overrides.

Pages Used to Disburse Aid with Overrides

Page Name	Definition Name	Navigation	Usage
Disburse Aid with Override	STDNT_DISB_PROC_WO	Financial Aid, Disbursements, Disburse Aid with Override, Disburse Aid with Override	Authorize and disburse aid using overrides. These overrides prevent global and financial aid item type rules from being enforced.
Disburse Aid with Overrides - Message Detail (inquiry)	STDNT_DISB_MSG_SP	Click the Messages link on the Disburse Aid page or the Disburse Aid with Override page.	Review messages for authorization failure, disbursement failure, disbursement success; review override messages.
Disburse Aid with Overrides - Message Detail: Description (inquiry)	STDNT_DISB_MSG1_SP STDNT_DISB_MSG1	Click the Messages link on the Disburse Aid - Message Detail page or on the Student Authorize/Disburse page.	View further information about the displayed message.

Authorizing and Disbursing Aid Using Overrides

Access the Disburse Aid with Override page (Financial Aid, Disbursements, Disburse Aid with Override, Disburse Aid with Override).

Disburse Aid with Override

Lamii Vigor ID: FA0711

Aid Year: 2005 Financial Aid Year 2004-2005 **Institution:** PSUNV

Term: 0540 2005 Spring **Career:** Undergrad

Term Disbursements Find | View All First 1-2 of 3 Last

Item Type: 900000000304 Sub Staff - Sem	Disb ID: 02 Spring	Disb Date: 01/14/2005
Accepted: \$1,312.00	Authorized: \$0.00	<input type="checkbox"/> Override Authorization
Net Disb Bal: \$1,261.00	Disbursed: \$0.00	Authorization Disbursement

Item Type: 900000000305 Unsub Staff Sem	Disb ID: 02 Spring	Disb Date: 01/14/2005
Accepted: \$0.00	Authorized: \$0.00	<input type="checkbox"/> Override Authorization
Net Disb Bal: \$0.00	Disbursed: \$0.00	Authorization Disbursement

Disburse Aid with Override page

The Disburse Aid with Override page displays all of the student's financial aid awards for the selected term. The financial aid award must have a status of *Accepted* for the Authorization button to be available. The page shows awards by term, so you can disburse aid only for one term at a time. This helps to prevent disbursing aid for subsequent terms unintentionally.

Override Authorization Select to have the authorization process ignore the global and financial aid item type disbursement rules. Then click the Authorization button to run authorization and make available the Disbursement button.

After you have authorized an award with overrides, the system clears this check box. The only way to determine whether the amount was authorized with overrides is to click the Messages link. The message *Authorization has been Overridden!* indicates that overrides were used.

Note. If you attempt to override authorization for external loans, such as the FFEL Stafford, Plus, and Alternative loans, the funds must be received at your institution or the authorization process fails, regardless of the override.

The descriptions for the other fields on this page match those on the Disburse Aid page.

See Also

[Chapter 41, "Authorizing and Disbursing Financial Aid," page 1627](#)

Reviewing Authorization and Disbursement Results

This section discusses how to:

- Review a student's authorization and disbursement activity.
- Review award summary information.

Page Used to Review Authorization and Disbursement Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Authorize/Disburse	STDNT_DISB1	Financial Aid, Disbursement, View Disbursement Status, Student Authorize/Disburse	Review a student's authorization and disbursement activity by term. The page displays only the awards that you have authorized or tried to authorize.

Reviewing a Student's Authorization and Disbursement Activity

Access the Student Authorize/Disburse page (Financial Aid, Disbursement, View Disbursement Status, Student Authorize/Disburse).

Student Authorize/Disburse

Renee Stowitzky

Aid Year:

2004

ID:

FA0860

Institution:

PSUNV

Find | View All

First 1 of 1 Last

Term:

0512

2004 Spring Qtr

Career

Ugrad Engr

Disb ID:

03

Item Type:

900000000370

Pell Grant - Qtr

Disb Plan:

P2

Offer:

\$1,250.00

Accept:

\$1,250.00

Auth:

\$1,250.00

Disbursed:

\$0.00

Messages

Find | View All

First 1 of 1 Last

Run Date/Time:

Disb ID:

03

Disb./Rule Value:

Student's Value:

Student Authorize/Disburse page

- Disb ID (disbursement ID)

Displays the disbursement ID for the award that occurs within the selected term. If the award has more than one disbursement that occurs within the term, and these disbursement IDs have been authorized, use the scroll arrows to view the other disbursement IDs.

Disb Plan (disbursement plan)

Displays the disbursement plan associated with the award.

Offer

Displays the award amount offered by the financial aid office to the student when the student was packaged.

Accept

Displays the award amount that the student has accepted.

Auth (authorized)

Displays the total amount that has been authorized for disbursement for that disbursement ID. This amount is zero until you have successfully authorized the award.

Disbursed

Displays the total amount that has been disbursed to the student for that disbursement ID. This amount is zero until you have successfully disbursed the award.

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Messages

You can view any authorization or disbursement messages for this disbursement ID in this group box.

Reviewing Award Summary Information

You view summary information regarding a student's financial aid awards and the authorized and disbursed amounts on several pages. These pages all include the authorized and disbursed amounts but vary in additional information and format.

Award Summary By Date

Use the As of Award Summary page (Financial Aid, Awards, View by Date, As of Award Summary) to review a student's aid information as of a particular date. The page displays information for the entire aid year, including the financial aid item type, the career, and the offered, accepted, authorized, and disbursed amounts for each award in that aid year. The information is from student award information and the authorization and disbursement processes.

See [Chapter 34, "Reviewing Awards," Reviewing Award Summary by Date, page 1210.](#)

Award Summary Information

Use the Award Summary page (Financial Aid, Awards, View Term Award Summary, Award Summary) to view a student's awards and the offered, accepted, authorized, and disbursed amounts for each award for the entire aid year. Totals for each type of amount are displayed at the bottom of the page. Authorized and disbursed amounts might not equal the accepted amount if not all terms have been disbursed.

See [Chapter 34, "Reviewing Awards," Reviewing an Annual Award Summary, page 1212.](#)

Award Summary Information By Category

Use the Award Category Totals page (Financial Aid, Awards, View Award Category Summary) to view awards by award category for the entire aid year. Totals for each award category and information about unmet need (including both federal and institutional calculations of need) are available. If the student has been overawarded by either federal or institutional calculations, the unmet need information is highlighted in red. You can click the drill-down button to view the awards included in each category—and the award status, offered, accepted, authorized, and disbursed amounts, and career, disbursement plan and split codes.

See [Chapter 34, "Reviewing Awards," Reviewing Award Summary Information by Category, page 1210.](#)

Earnings Summary and Awards

Use the Awards/Earnings Summary component to view a student's financial aid awards and campus earnings. Information for each award includes the associated career, offered amount, accepted amount, authorized amount, and disbursed amount. The campus earnings information includes hours worked and gross earnings expressed in year-to-date, month-to-date, and quarterly amounts.

See [Chapter 44, "Managing Work-Study," page 1727.](#)

Chapter 42

(UK) Using Student Loans Company

The Campus Solutions Student Loans Company (SLC) feature assists higher education institutions (HEIs) in the United Kingdom (UK) in administering their SLC student assistance programs.

This chapter lists common elements and discusses how to:

- Import Student Support Attendance Requests (SSAR) files.
- Manage SSAR suspensions.
- Generate Student Support Attendance Confirmation (SSAC) data.
- Import Higher Education Bursaries and Scholarships Scheme (HEBSS) files.
- Manage HEBSS suspensions.
- Import Attendance Confirmation Report (ACR) and Tuition Fee Position Report (TFPR) files.
- Manage ACR and TFPR suspensions.
- Run the ACR At Fee Evaluation process.
- Export the ACR Response file.
- Import Tuition Fee Remittance Advice (TFRA) files.
- View TFRA staging data.
- View SLC student data.
- Reconcile Tuition Fee Payments
- Update HEI Course Database data.
- Maintain HEI data.

See Also

Chapter 16, "(UK) Setting Up Student Loans Company," page 469

Common Elements Used in this Chapter

HEI Code (higher education institution code)	Select the code for which you want to load the data. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.
SLC Acad Year (Student Loans Company academic year)	Select the SLC academic year for which you want to load the data. The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.
File Path and Name	Enter one or more files to import. If a file is not entered, the process considers only unprocessed records.
<hr/> Note. The definitions for HEI Code,SLC Acad Year, and File Path and Name relate to the sections of the chapter that discuss importing files. <hr/>	
UCAS Course Code (Universities & Colleges Admissions Service course code)	Displays the UCAS code assigned to the course.
SLC Course Code (Student Loans Company course code)	Displays the SLC code assigned to the course.
Year of Course	Displays the year of the course in which student is currently enrolled.
Course Tuition Fee Amt (course tuition fee amount)	Displays the course fee that applies to the course.
Tuition Fee Loan Payable	Displays the portion of the fee paid by TFL.
Tuition Fee Grant Payable	Displays the portion of the fee paid by TFG.
Tuition Fee Student Payable	Displays the portion of the fee that the SLC expects to be paid directly by student.
Course Start Date	Displays date that the student commenced the course.
Grant Payable	Indicates whether the student is entitled to a supplementary grant.
Bank Details Held	Indicates whether the student has supplied bank details.
Valid NINO Flag (valid national insurance number flag)	Indicates whether the student has provided a valid national insurance number or a valid reason for not supplying it.

Disabled Distance Learner	Indicates whether the applicant is a distance learner due to a disability.
Bursary Student Flag	Indicates whether the student has a bursary.
FSN Status or Student Status	<p>Displays the student notification status as notified by the awarding authority. Values are:</p> <ul style="list-style-type: none"> • <i>B (Living Costs and Fees).</i> • <i>L (Living Costs).</i> • <i>F (Final).</i> • <i>P (Provisional).</i> • <i>D (Deceased).</i> • <i>K (Resumption).</i> • <i>N (Resumption).</i> • <i>S (Suspended).</i> • <i>T (Transfer fees to previous institution).</i> • <i>V (Transfer fees to new institution).</i> • <i>W (Withdrawn-final).</i> • <i>Y (Withdrawn-provisional).</i> • <i>Z (Study in second term only).</i>
Student Support Nbr (student support number)	Displays an identifier assigned by the SLC to a student who applies for financial assistance.

Importing SSAR Files

This section provides an overview of SSAR files and discusses how to load SSAR files.

Understanding SSAR Files

After the SLC receives applications for financial assistance from students, the SLC sends SSAR reports to the HEIs. These reports list individual students attending the HEI and include biographic and demographic data, information about the students' courses of study, and the amount of Tuition Fee Grant (TFG) and Tuition Fee Loan (TFL) assistance that each student can expect. The amounts for the TFG and TFL are used to offset students' tuition fee charges.

SSAR reports require a response from the HEI in the form of an SSAC.

The Import SSAR File process:

1. Loads data into a staging table.
2. Attempts to match on Social Security number (SSN).

If a match exists, the record is loaded to the application table for use in the system. A student with a match is aid-year activated for the aid year selected in the Student Loans Company Setup (SFA_SLC_SETUP) component.

Page Used to Load SSAR Files

Page Name	Definition Name	Navigation	Usage
Import SSAR Files	SFA_SLC_RC_SSAR	Financial Aid, Student Loans Company, Import SSAR Files, Import SSAR Files	Load SSAR files.

Loading SSAR Files

Access the Import SSAR Files page (Financial Aid, Student Loans Company, Import SSAR Files, Import SSAR Files).

Import SSAR Files page

Managing SSAR Suspensions

This section provides an overview of SSAR suspensions and discusses how to review and manage unmatched or unprocessed SSAR data.

Understanding SSAR Suspensions

Use the Manage SSAR Suspense (SFA_SLC_SSAR_DTL) component to review and manage unmatched or unprocessed SSAR data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed SSAR Data

Page Name	Definition Name	Navigation	Usage
Manage SSAR Suspend	SFA_SLC_SSAR_DTL	Financial Aid, Student Loans Company, Manage SSAR Suspend, Manage SSAR Suspend	Review and manage unmatched or unprocessed SSAR data.

Reviewing and Managing Unmatched or Unprocessed SSAR Data

Access the Manage SSAR Suspend page (Financial Aid, Student Loans Company, Manage SSAR Suspend, Manage SSAR Suspend).

Manage SSAR Suspend

HEI Code RWSA
SLC Acad Year 2008
File Name RWSA08CR05050800002.bt
Status Suspended 08/26/08 9:34PM Match Option set to Suspend

Search Match

[Search Match](#) ID ☐ ID Lock [Use Search Match ID](#) Process SSAR Max Match Level 50 Matches 1

Identification

Student Support Nbr RCHD07000053N	UCAS Number
Title Mr Sex F	Date of Birth 07/13/1989
First Name Ernest	Address <input type="text" value="3225A OAKWELLY MOUNT LEEDS"/>
Middle Name Lou	
Last Name Grainger	Post Code LS8 4HH

Manage SSAR Suspend page (1 of 2)

Course/SLC Data					
Issue Date		08/01/2008			
UCAS Course Code		C800A			
SLC Course Code		48225 PSYCHOLOGY (SCIENCE)			
Year of Course		1		Course Start Date	
				09/17/2007	
Course Tuition Fee Amt		3070.00		Loan Applied For	F
				Attendance Confirmed	N
Tuition Fee Loan Payable		3070.00		Grant Payable	N
				Valid NINO	N
Tuition Fee Grant Payable		0.00		FSN Status	F
				Disabled Distance Learner	N
Tuition Fee Student Payable		0.00		Bank Details Held	Y

Manage SSAR Suspense page (2 of 2)

After a match is identified, you can load the data in the Student SLC Data table used for SSAC generation and award packaging.

Status

If the status is *Processed*, you can only view the field.

If the status is one of the following values, you can select a different value and click Save to update the SSAR status:

- *Skipped*: This record will not be considered for matching in any future runs of the Import SSAR Files process.
- *Suspended*: No match was found for this record. The record will be considered for matching the next time that the Import SSAR Files process is run.
- *Unprocessed*: The record will be considered for matching the next time that the Import SSAR Files process is run.

You can update students with a *Skipped* status to *Unprocessed* so they can be considered for matching the next time that the Import SSAR Files process is run.

Search Match

Search Match

Click this link to access the Person Search Match page and search for a student ID to match the SSAR record.

ID

The EMPLID of the existing person with whom you want to match this record.

ID Lock

After you enter an ID, select this check box to force the SSAR load process to use the ID.

Use Search/Match ID

Click this link to populate the ID field with the result from the Person Search/Match.

Process SSAR (process Student Support Attendance Requests)	<p>Click to force the SSAR record to be matched with the EmplID that you selected. If the match is successful, the SSAR record is loaded. If the match is not successful, a message appears in the page header message area:</p> <ul style="list-style-type: none"> • <i>Student Not Found</i> • <i>Multiple Student Matches Found</i> • <i>Match Option Set to Suspend:</i> A match was found after Search/Match was run, but the Search/Match rule set the record to <i>Suspended</i>. • <i>ID Linked to Another SSN:</i> EmplID already has an external ID type of <i>SLC</i>. • <i>SSN Linked to Another ID:</i> The SSN in this record is already associated with an EmplID.
Max Match Level (maximum match level)	Displays the highest Search Match Level rule that was met for this SSAR record.
Matches	Displays the number of matches found by the Search Match process.
Course/SLC Data	
Issue Date	Displays the date that the SLC issued the SSAR to the HEI.
Loan Applied For	<p>Displays the type of loan for which the student applied. Values are:</p> <ul style="list-style-type: none"> • <i>F (Full Entitlement)</i> • <i>P (Part Entitlement)</i> • <i>N (No loan applied for)</i>
Attendance Confirmed	Indicates whether attendance is confirmed.

Generating SSAC Data

This section provides an overview of SSAC data and discusses how to:

- Add SSAC data manually.
- Generate SSAC data.

Understanding SSAC Data

SSARs can be received daily and are usually responded to the same day with an extract of data, the SSAC file, that is sent back to SLC. Occasionally, schools may also need to include students for whom no SSAR has been received in an SSAC extract. The SSAC confirms the physical attendance of each student on the campus. The HEIs must ultimately record that a student has been seen and report that information to the SLC in an SSAC file.

The receipt of the SSAC by the SLC authorizes the beginning of maintenance (living expense) payments directly to the student by government authorities. This assistance is different from the TFGs and TFLs, which are for tuition fees only and paid directly to the institution. The HEI does not determine what the maintenance payments are and does not need to monitor these payments.

For a student to be automatically included in the SSAC extract, the student must:

- Have a SSAR record loaded.
- Have no previous SSAC processed.
- Be included in the selected Population Selection option.
- Meet requirements in the SLC setup:
 - If the Use Physical Attendance Flag check box is selected on the Student Loans Company-Options (setup) page, the Physical Attendance Confirmed check box must be selected for the student on the SSAC page in the View SLC Student Data (SFA_SLC_STUDENT) component for the student to be included in the SSAC extract.
 - If a checklist is selected in the Use Checklist field on the Student Loans Company-Options (setup) page, the student must have that checklist assigned and completed to be included in the SSAC Extract.

If the Complete SSAR Checklist check box on the Student Loans Company–Options page is selected, students who were assigned an SSAR Checklist during the Import SSAR Files process and are added to the SSAC extract have their SSAR Checklists marked as complete.

For a student to be manually included in an SSAC extract, add the student to the SSAC Manual Entry table using the Manual SSAC Manual Entry page.

Pages Used to Generate SSAC Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage SSAC Manual Entry	SFA_SLC_SSACMAN	Financial Aid, Student Loans Company, Manage SSAC Manual Entry, Manage SSAC Manual Entry	Add a student manually for inclusion in an SSAC extract file.
Generate SSAC Data	SFA_SLC_RC_SSAC	Financial Aid, Student Loans Company, Generate SSAC Data, Generate SSAC Data	Define SSAC parameters and generate SSAC data in an extract file.

Adding SSAC Data Manually

Access the Manage SSAC Manual Entry page (Financial Aid, Student Loans Company, Manage SSAC Manual Entry, Manage SSAC Manual Entry).

Manage SSAC Manual Entry

Institution PSUNV HEI Code RWSA
Aid Year 2009 SLC Acad Year 2008

Manage SSAC Entries Customize | Find | View All | First 1-3 of 3 Last

SSAC Information File Information

*Student Support Nbr	*ID	Name	Attendance Confirmed Date	UCAS Course Code	SLC Course Code	Course Year		
RCHD07000006N	FASLC016	Gwen Cooper	05/20/2009	L100A	48654	3	+	-
RCHD08000015N	FASLC026	Geoffrey Dion	05/20/2009				+	-
RCHD08000010N	FASLC021	Richie Ellison					+	-

Save Return to Search Notify

Manage SSAC Manual Entry page

Use this page when you want to include a student in an SSAC extract but no SSAR record has been received for the student.

Student Support Nbr Add a new row and enter a student's SSN.

- If the SSN is already in the External System ID table, the ID and name are automatically entered when you tab out of the Student Support Nbr field.
- If the SSN is not in the system, you must manually enter the ID. The name is automatically entered when you tab out of the ID field. When the row is saved, the SSN is added to the External System ID table for that student ID.

The Attendance Confirmed Date, UCAS Course Code, SLC Course Code, and Course Year fields are optional. If both a UCAS Course Code and SLC Course Code are entered, the UCAS Course Code is used in the SSAC file.

When the Generate SSAC Data process is run, it includes any unprocessed SSAC manual entries in the SSAC file that is created by the process. These entries remain on the Manage SSAC Manual Entry page in view-only mode after being processed and included in an SSAC file.

When the Import SSAR Files process is run and SSAR data is imported for a student whose SSAC data was entered manually, the process checks to see if a SSAC record exists. If the SSAC record does not exist, the process creates a SSAC record using the manually entered SSAC data.

Generating SSAC Data

Access the Generate SSAC Data page (Financial Aid, Student Loans Company, Generate SSAC Data, Generate SSAC Data).

Generate SSAC Data page

Use this page to create an extract file to send to the SLC to confirm a student's physical attendance.

The Population Selection process is used to determine which students are included in the SSAC extract file that is sent to the SLC. The Population Selection group box appears if you select either the *Populate* process option or the *Populate and Export* process option.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Population Selection Process Queries and Equations."

Input Parameters

Process Option

Select a process option. Values are:

- *Populate Only*: Populate the SSAC table.
- *Export Only*: Create only an extract file of populated SSAC data to send to the SLC.
- *Populate and Export*: Populate the SSAC table and create an extract file of SSAC data to send to the SLC.

File Path

Enter the location for the extract file.

This field is activated if a value of *Export Only* or *Populate and Export* is selected in the Process Option field.

The file path must end with a backslash (\).

Location Code

Enter the location code for the specific location at the HEI. The values range from 01 to 99.

Importing HEBSS Files

This section provides an overview of HEBSS files and discusses how to load HEBSS files.

Understanding HEBSS Files

HEIs in the UK can elect to participate in the HEBSS with the SLC. The scheme determines student eligibility for and disburses various bursaries and scholarships.

Schools can choose to provide criteria to the SLC and let the SLC determine eligibility for and disburse bursaries and scholarships on their behalf. Alternatively, schools might use financial circumstances data collected by the SLC and included in the HEBSS report to determine bursary and scholarship eligibility and disburse these funds to the students themselves. This report does not require a response from the HEI.

The Import HEBSS Files process:

1. Loads the data to a staging table.
2. Attempts to match on SSN:
 - If a match exists, the record is loaded to an application table for use in the system.
 - If no match exists, the process attempts a match using the Search Match Criteria page in the Student Loans Company Setup component.

If a match is found, the record is loaded to the application table for use in the system.

Page Used to Load HEBSS files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import HEBSS Files	SFA_SLC_RC_HEBSS	Financial Aid, Student Loans Company, Import HEBSS Files, Import HEBSS Files	Load HEBSS files.

Loading HEBSS Files

Access the Import HEBSS Files page (Financial Aid, Student Loans Company, Import HEBSS Files, Import HEBSS Files).

Import HEBSS Files page

Managing HEBSS Suspensions

This section provides an overview of HEBSS suspensions and discusses how to review and manage unmatched or unprocessed HEBSS data.

Understanding HEBSS Suspensions

Use the Manage HEBSS Suspense (SFA_SLC_HEBSS_DTL) component to review and manage unmatched or unprocessed HEBSS data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed HEBSS Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage HEBSS Suspense	SFA_SLC_HEBSS_DTL	Financial Aid, Student Loans Company, Manage HEBSS Suspense, Manage HEBSS Suspense	Review and manage unmatched or unprocessed HEBSS data.

Reviewing and Managing Unmatched or Unprocessed HEBSS Data

Access the Manage HEBSS Suspense page (Financial Aid, Student Loans Company, Manage HEBSS Suspense, Manage HEBSS Suspense).

Manage HEBSS Suspende

HEI Code RWSA

SLC Acad Year 2008

File Name HEBSS_5.bt

*Status Suspended 09/25/08 9:24AM Match Option set to Suspend

Search Match

Search Match

ID FASLC050

ID Lock

Use Search Match ID

Process HEBSS

Max Match Level 40

Matches 1

Identification

Student Support Nbr RCHD08000035Y

UCAS Number

ART ID

First Name Roza

Date of Birth 02/19/1987

Last Name Alexander

Sex F

Address Line 1 1225A OAKWELLY MOUNT

Address Line 2 A

Address Line 3 B

City LEEDS

County A

Post Code LS8 5ZY

Domicile ENGLAND

Manage HEBSS Suspende page (1 of 2)

Application/Award Information

Assessment Date 02/01/2008

Non-Means Test N

Automated Award Total 151.00

Principle Earner Income 4901.72

Childcare Grant N

Manual Award Total 251.00

Household Income 2751.72

Adult Dependent Support N

Overall Award Total 402.00

Student Support Eligibility Eligible

Evidence Verified Y

Bank Details Held Y

Number of Sponsors 1

Income Assessed Funding N

New Student Y

Non-Income Assessed Funding N

Course Information

Course Type OTHER

Course Start Date 09/03/2007

Campus Code G

UCAS Course Code N1X1A

Commence Year 2008

SLC Course Code 71593 SECONDARY (ECON/BUS STUDS)

Method of Attendance Full Time

Qualification FD

Manage HEBSS Suspende page (2 of 2)

Note. For information about the Status field and the fields in the Search Match group box, refer to the information provided about similar fields on the Manage SSAR Suspende page.

Identification

ART ID (Automated Response Technology Identification)

The ART ID is an eleven-digit number that is used to uniquely identify a student's SLC student finance account. It is automatically issued when the student applies for financial support.

Application/Award Information

Automated Award Total	Displays the student's total approved automated award entitlement as awarded by SLC using HEI rules.
Manual Award Total	Displays the student's total approved manual award entitlement, which is manually entered in the SLC system by the HEI.
Overall Award Total	Displays the student's total overall approved award entitlement.
Non-Means Test	Indicates whether the student is applying for only non-means-tested support.
Evidence Verified	Indicates whether all financial evidence has been received to validate the student's application.
Income Assessed Funding	Indicates whether the student has applied for income assessed NHS funding.
Non-Income Assessed Funding	Indicates whether the student has applied for non-income assessed NHS funding.

Course Information

Course Type	<p>Displays the course type. Values are:</p> <ul style="list-style-type: none"> • <i>ACCELERATED</i> (Course compresses a two year course into one year of study) • <i>ART TEACHER</i> • <i>EMERGENCY</i> • <i>FRANCHISED</i> • <i>OTHER</i> • <i>PART TIME</i> • <i>PGCE</i> (Post Graduate Certificate In Education)
Method of Attendance	<p>Displays the method of attendance. Values are:</p> <ul style="list-style-type: none"> • <i>Full Time</i> • <i>Part Time</i> • <i>PGCE</i> (post graduate)
Qualification	Displays the qualification achieved upon course completion.
Commence Year	The year that the student commenced studying.

Importing ACR and TFPR Files

This section provides an overview of ACR and TFPR files and discusses how to load ACR and TFPR files.

Understanding ACR and TFPR Files

The ACR and TFPR files contain TFG and TFL information for individual students.

The ACR file requires a response from the HEI to the SLC. When the HEI responds, it confirms student data to the SLC, including attendance and course of study information. These files are sent to the HEI from the SLC starting in December of each academic year.

The TFPR file is informational only and does not require a response from the HEI. It is sent to the HEI from the SLC in October and November of each academic year.

Use the Import ACR/TFPR Files (SFA_SLC_RC_ACR) component to set up and run batch import of ACR/TFPR files. These two files have the same format. The user interface designates if the record is a TFPR record.

The Import ACR/TFPR Files process:

1. Loads the data into a system table.
2. Attempts to match on SSN:
 - If a match exists, the record is loaded to the application table for use in the system.
 - If no SSN match exists, the process attempts to match using Search/Match criteria designated in Student Loans Company Setup component.

If a match exists, the record is loaded to the application table for use in the system.

Page Used to Load ACR and TFPR Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import ACR/TFPR Files	SFA_SLC_RC_ACR	Financial Aid, Student Loans Company, Import ACR/TFPR Files, Import ACR/TFPR Files	Load ACR and TFPR files.

Loading ACR and TFPR Files

Access the Import ACR/TFPR Files page (Financial Aid, Student Loans Company, Import ACR/TFPR Files, Import ACR/TFPR Files).

Import ACR/TFPR Files

Run Control ID: ACR1 [Report Manager](#) [Process Monitor](#) **Run**

ACR/TFPR Parameters

*HEI Code ☐ Tuition Fee Position Report

*SLC Acad Year

File Path and Name

Import ACR/TFPR Files page

ACR/TFPR Parameters

Tuition Fee Position Report You must select this check box if the file being loaded is a TFPR.
You must clear the check box if the file being loaded is an ACR.

Managing ACR and TFPR Suspensions

This section provides an overview of ACR and TFPR suspensions and discusses how to review and manage unmatched or unprocessed ACR and TFPR data.

Understanding ACR and TFPR Suspensions

Use the Manage ACR/TFPR Suspense (SFA_SLC_ACR_DTL) component to review and manage unmatched or unprocessed ACR and TFPR data.

The system does not provide an option for adding a new person to the system as a result of reviewing unmatched or unprocessed data.

Also, this process does not update Campus Community Person biographic and demographic data.

Page Used to Review and Manage Unmatched or Unprocessed ACR and TFPR Data

Page Name	Definition Name	Navigation	Usage
Manage ACR/TFPR Suspende	SFA_SLC_ACR_DTL	Financial Aid, Student Loans Company, Manage ACR/TFPR Suspende, Manage ACR/TFPR Suspende	Review and manage unmatched or unprocessed ACR and TFPR data.

Reviewing and Managing Unmatched or Unprocessed ACR and TFPR Data

Access the Manage ACR/TFPR Suspende page (Financial Aid, Student Loans Company, Manage ACR/TFPR Suspende, Manage ACR/TFPR Suspende).

Manage ACR/TFPR Suspende			
HEI Code	RWSA	Issue Date	05/06/2008
SLC Acad Year	2008	Record Count	1
File Name	FNI_RWSA200802.out.txt	Total Tuition Fee Loan Payable	3070.00
HEI Name	RWS UNIVERSITY	Total Tuition Grant Payable	3070.00
*Status	Suspended	Total Tuition Fee Student Pays	0.00
08/26/2008 10:18PM Multiple student matches found			
Search Match			
Search Match	ID GG P45 M10B	<input type="checkbox"/> ID Lock	Use Search Match ID
		Process	Max Match Level 50 Matches 3
Identification			
Student Support Nbr	RCHD08000002N	UCAS Number	10948916
Last Name	Bucket	Date of Birth	01/03/1989
First Name	Sheridan		

Manage ACR/TFPR Suspende page (1 of 2)

Course/SLC Data			
Course Start Period	AUT	Course Tuition Fee Amt	3070.00
Course Code	C800A	Tuition Fee Loan Payable	3070.00
Course Short Name	PSYCHOLOGY (SCIENCE)	Tuition Fee Grant Payable	0.00
Year of Course	1	Tuition Fee Student Payable	0.00
Student Status	F	Revision Indicator	Y
Student Status Date	05/15/2008	Bursary Student Flag	
New Record	N	Disabled Distance Learner	N
		Valid NINO Flag	N
		Attendance Indicator	

Manage ACR/TFPR Suspende page (2 of 2)

Note. For information about the Status field and the fields in the Search Match group box, refer to the documentation about the similar fields on the Manage SSAR Suspense page.

Course/SLC Data

Course Start Period	Displays the period when the course starts, for example <i>AUT</i> (<i>Autumn</i>).
Course Code	Displays the UCAS code or SLC code that is assigned to the course.
Student Status Date	Displays the date that the student status was assigned or updated.
New Record	Indicates whether the record appeared on a previous ACR/TFPR.
Revision Indicator	Indicates whether the record has changed since a previous ACR/TFPR.
Attendance Indicator	If an At Fee Code was returned in a previous ACR Response, it appears here.

Running the ACR At Fee Evaluation Process

This section provides an overview of ACR At Fee Evaluation and discusses how to calculate the At Fee Code for ACR records.

Understanding ACR At Fee Evaluation

Use the ACR At Fee Evaluation (SFA_SLC_RC_ACR_EQ) component to determine the At Fee Code to be returned to the SLC in the file created by the ACR Export File process.

The ACR At Fee Evaluation process uses any equations defined in the ACR Processing group box in the Student Loans Company Setup component to populate variables that can be used by the At Fee Equation and also executes the At Fee Equation. The At Fee Equation populates a student's ACR Attendance Indicator (on the ACR/TFPR page), which determines what At Fee Code is returned to the SLC with the ACR Response.

Page Used to Calculate the At Fee Code for ACR Records

Page Name	Definition Name	Navigation	Usage
ACR At Fee Evaluation	SFA_SLC_RC_ACR_EQ	Financial Aid, Student Loans Company, ACR At Fee Evaluation, ACR At Fee Evaluation	Calculate the At Fee Code value for ACR records.

Calculating the At Fee Code for ACR Records

Access the ACR At Fee Evaluation page (Financial Aid, Student Loans Company, ACR At Fee Evaluation, ACR At Fee Evaluation).

ACR At Fee Evaluation

Run Control ID: ATFEE1 [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria Find First 1 of 1 Last

*Institution PSUNV *Aid Year 2008 *HEI Code RWSA *Issue Date 05/08/2008

ACR At Fee Evaluation page

Issue Date Enter the issue date of the ACR file that you want to evaluate.

The following table describes the At Fee Code values as defined by the SLC:

At Fee Code	Description
A	HEI agrees that the student is in attendance for the attendance date, course and course year shown and they agree with the Course Tuition Fee amount and the Liability (combination of Tuition Fee Loan and Student Pays). It is important that the HEI ensure that the fee liability is correct, because using code A results in the fee loan and/or grant showing on the Attendance Confirmation Report as being paid.
C	The student is in attendance at the institution but for a different course and/or year of course to those shown on the schedule. (For example, the year of course is shown as 2 on the schedule but the student is repeating the first year).
F	Student is in attendance; however the HEI disagrees with the course fee.
L	Student is in attendance at the HEI, for the course and course year indicated, however the HEI disagrees with the Liability (combination of Tuition Fee Loan and Student Pays) but undertakes to make reparations to the student such that the liability is correctly discharged and no overpayment of Tuition Fee support to that institution exists.
N	Student is in attendance at the HEI, for the course and course year indicated, however the HEI disagrees with the Liability (combination of Tuition Fee Loan and Student Pays) but does not undertake to make reparations to the student such that the liability would be correctly discharged and no overpayment of Tuition Fee support to that institution would exist.
X	Student is not in attendance on the relevant attendance date, except where the non attendance is due to the student suspending their studies.
S	Studies suspended.

Exporting the ACR Response File

This section provides an overview of the ACR Response File and discusses how to export the ACR Response File.

Understanding the ACR Response File

Use the Export ACR File (SFA_SLC_RC_ACR_EXP) component to create an extract file to send to the SLC.

The Export ACR File process creates the ACR Response File using the values in the Attendance Indicator field. This field contains the At Fee Code values.

The process does not export a TFPR.

The process does not create a file for an ACR for which a previous response has been created.

Page Used to Export the ACR Response File

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Export ACR File	SFA_SLC_RC_ACR_EXP	Financial Aid, Student Loans Company, Export ACR File, Export ACR File	Export the ACR Response file.

Exporting the ACR Response File

Access the Export ACR File page (Financial Aid, Student Loans Company, Export ACR File, Export ACR File).

Export ACR File page

Issue Date	Enter the issue date of the ACR file that you want to process.
File Path	Enter a path to indicate where to store the extract file.

Importing TFRA Files

This section provides an overview of TFRA files and discusses how to load TFRA files.

Understanding TFRA Files

TFRA reports are sent to the HEI from the SLC and correspond with the receipt of Tuition Fee payments from the SLC to the HEI. These reports do not require a response from the HEI.

The major TFRA files are sent to the HEI from the SLC in February and April of each academic year. The HEI might also receive additional TFRA files that contain adjustments to the data that was previously sent.

Use the Import TFRA Files (SFA_SLC_RC_TFRA) component to load TFRA files to a staging table and use them for reconciliation with system data.

Page Used to Load TFRA Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import TFRA Files	SFA_SLC_RC_TFRA	Financial Aid, Student Loans Company, Import TFRA Files, Import TFRA Files	Load TFRA files.

Loading TFRA Files

Access the Import TFRA Files page (Financial Aid, Student Loans Company, Import TFRA Files, Import TFRA Files).

Import TFRA Files

Run Control ID: 1217547072

[Report Manager](#) [Process Monitor](#)

Run

File Information

*HEI Code

*SLC Acad Year

*File Path and Name

+

-

Import TFRA Files page

Viewing TFRA Staging Data

This section discusses how to view TFRA imported data.

Page Used to View TFRA Imported Data

Page Name	Definition Name	Navigation	Usage
View TFRA Staging Table Data	SFA_SLC_TFRA_DTL	Financial Aid, Student Loans Company, View TFRA Staging Table Data, View TFRA Staging Table Data	View TFRA imported data.

Viewing TFRA Imported Data

Access the View TFRA Staging Table Data page (Financial Aid, Student Loans Company, View TFRA Staging Table Data, View TFRA Staging Table Data).

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View TFRA Staging Table Data			
HEI Code	RWSA	Payment Date	03/08/2008
SLC Acad Year	2008	Payment Type	
File Name	RWSA_2008_FT_08032008_remittance.dat		
HEI Name	RWS University		
TFRA Information			
Student Support Nbr	RGHD08000002N	Date of Birth	01/03/1989
		UCAS Number	10948916
Last Name	Bucket		
First Name	Sheridan		
Course Start Period	AUT		
Course Code	C800A	Course Short Name	PSYCHOLOGY (SCIENCE)
Year of Course	1	Fee Amount	3070.00
Revision Indicator			

View TFRA Staging Table Data page

Payment Date Displays the date that the funds are transferred to HEI.

Payment Type Displays the type of funds being transferred:

- *T: Loan*
- *G: Grant*

This field is blank if the information was not provided in the TFRA file.

Total Fee Amount Displays the total net amount of fees in this roster.

Record Count Displays the total number of records in this roster.

TFRA Information

Course Start Period Displays the period when the course starts, for example *AUT (Autumn)*.

Course Code Displays the UCAS code that is assigned to the course.

Revision Indicator Indicates a change in entitlement since a previous ACR.

Fee Amount Displays the fee amount for the student.

Viewing SLC Student Data

This section discusses how to:

- View SSAR student data.
- View SSAR name and address data.
- View SSAC student data.
- View SSAC export data.
- View ACR and TFPR data.
- View HEBSS student data.

Pages Used to View Student Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SSAR	SFA_SLC_SSAR	Financial Aid, Student Loans Company, View SLC Student Data, SSAR	View SSAR data.
SLC SSAR Name and Address	SFA_SLC_SSAR_SEC	Click the Name/Address link on the SSAR page.	View SSAR name and address data.
SSAC	SFA_SLC_SSAC	Financial Aid, Student Loans Company, View SLC Student Data, SSAC	View SSAC student data.
View SSAC Export Data	SFA_SLC_SSAC_DTL	Financial Aid, Student Loans Company, View Exported SSAC Data	View SSAC export data.
ACR/TFPR	SFA_SLC_ACR	Financial Aid, Student Loans Company, View SLC Student Data, ACR/TFPR	View ACR and TFPR student data.
HEBSS	SFA_SLC_HEBSS	Financial Aid, Student Loans Company, View SLC Student Data, HEBSS	View HEBSS student data.
SLC HEBSS Name and Address	SFA_SLC_HEBSS_SEC	Click the Name/Address link on the HEBSS page.	View HEBSS name and address data.

Viewing SSAR Student Data

Access the SSAR page (Financial Aid, Student Loans Company, View SLC Student Data, SSAR).

SSAR		SSAC		ACR/TFPR		HEBSS	
ID	FASLC022	Frances Bacone					
Institution	PSUNV	Financial Aid Year 2008 - 2009					
HEI Code	RWSA	SLC Acad Year	2008	<input checked="" type="checkbox"/> Physical Attendance Confirmed			
SSAR Information Find View All First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last							
Issue Date	08/01/2008	Sequence	1	FSN Status	Final		
Student Support Nbr	ROHD08000011N	UCAS Number		SSAR File Seq	1	Name/Address	
Course Information							
UCAS Course Code	A206A	DENTISTRY (FIRST YEAR ENTRY)					
SLC Course Code	48157	Year of Course	2	Course Start Date	09/17/2007		
Fee Support							
Course Tuition Fee Amt	3,000.00	Loan Applied For Full Entitlement					
Tuition Fee Loan Payable	0.00	Other Information					
Tuition Fee Grant Payable	0.00	<input type="checkbox"/> Grant Payable <input checked="" type="checkbox"/> Attendance Confirmed <input checked="" type="checkbox"/> Bank Details Held					
Tuition Fee Student Payable	3,000.00	<input checked="" type="checkbox"/> Valid NINO <input type="checkbox"/> Disabled Distance Learner					

SSAR page

Use this page to view the details of students' SSAR records. The page is view-only with the exception of the Tuition Fee Loan Payable and Tuition Fee Grant Payable fields. These fields can be updated for Scottish students whose SSNs begin with SAAS.

Physical Attendance Confirmed

Select this check box to indicate that a student's physical attendance on the campus has been confirmed. This check box can be selected on this page or set by the institution's custom process.

SSAR Information

Issue Date

Displays the issue date of the SSAR.

Sequence

Displays the internal sequence number used to indicate the version of the individual student's SSAR file.

SSAR File Seq (Student Support Attendance Requests file sequence number)

Displays the sequence number, which is unique within the SLC for the HEI, academic year, and file type.

Fee Support

Tuition Fee Loan Payable

Displays the portion of the fee paid by TFL.

Note. You can update this field for Scottish students whose SSNs begin with SAAS.

Tuition Fee Grant Payable

Displays the portion of the fee paid by the TFG.

Note. You can update this field for Scottish students whose SSNs begin with SAAS.

Loan Applied For

Displays the type of loan for which the student applied. Values are:

- *F (Full Entitlement)*
- *P (Part Entitlement)*
- *N (No loan applied for)*

Viewing SSAR Name and Address Data

Access the SLC SSAR Name and Address page (click the Name/Address link on the SSAR page).

SLC SSAR Name and Address			
ID	FASLC022	Frances Bacone	
Institution	PSUNV	Financial Aid Year 2008 - 2009	Issue Date 08/01/2008
HEI Code	RWSA	SLC Acad Year 2008	Sequence Number 1
Title	Mrs		
First Name	Frances		
Middle Name	Lou		
Last Name	Bacone		
Sex	Female		
Date of Birth	01/22/1987		
Address	<input type="text" value="456 CAMBRIDGEN ROAD MIDDLESBROUGH"/>		
Post Code	TS5 5HF		
Return			

SLC SSAR Name and Address page

Use this page to help determine whether you are matching to the correct person.

Viewing SSAC Student Data

Access the SSAC page (Financial Aid, Student Loans Company, View SLC Student Data, SSAC).

SSAR

SSAC

ACR/TFPR

HEBSS

ID

FASLC022

Frances Bacone

Institution

PSUNV

Financial Aid Year 2008 - 2009

HEI Code

RWSA

SLC Acad Year

2008

☒Physical Attendance Confirmed

SSAC Information

Student Support Nbr

RCHD08000011N

Processing Status

Processed

08/26/08 1:46PM

Attendance Confirmed Date

08/26/2008

Location Code

01

UCAS Course Code

File Seq Nbr

1

SLC Course Code

Year of Course

SSAC page

You can view the details of SSAC data for students on this page. This page is view-only with the exception of the SLC Course Code and Year of Course fields. These fields can be updated after the SSAC data is populated but before exporting the data. After the SSAC data is exported, these fields are also view-only.

Physical Attendance Confirmed

Select this check box to indicate that a student's physical attendance on the campus has been confirmed. This check box can be selected on this page or set by the institution's custom process.

SSAC Information

Processing Status

A status of *Processed* indicates that the SSAC data has been exported to a file.
A status of *Unprocessed* indicates that the SSAC data has not been exported to a file.

Attendance Confirmed Date

Displays the date that the Physical Attendance Confirmed check box was selected for the student.

Location Code

Displays a two-digit location code representing a specific location at the HEI. The default value is *01* and the range is *01* to *99*.

File Sequence Nbr(file sequence number)

Displays an internal sequence number.

Viewing SSAC Export Data

Access the View Exported SSAC Data page (Financial Aid, Student Loans Company, View Exported SSAC Data).

View Exported SSAC Data

HEI Code

RWSA

Location Code

01

SLC Acad Year

2008

Sequence Number

1

File Path

\\bursqa01\rat02\Release_90\Products\FA\UK_SLC_90\TestData\SSAC\

File Name

RWSA08CR26080800101.bt

Status

Processed

08/26/08 1:46PM

SSAC Information

Student Support Nbr

RCHD08000011N

Attendance Confirmed Date

08/26/2008

Course Code

Year of Course

View Exported SSAC Data page

Use this page to view the details of the students' exported SSAC data.

Attendance Confirmed Date

Displays the date that the Physical Attendance Confirmed check box was selected for the student.

Viewing ACR and TFPR Student Data

Access the ACR/TFPR page (Financial Aid, Student Loans Company, View SLC Student Data, ACR/TFPR).

SSAR	SSAC	ACR/TFPR	HEBSS
ID	FASLC039	Vanessa Beaumont	
Institution	PSUNV	Financial Aid Year 2008 - 2009	
HEI Code	RWSA	SLC Acad Year 2008	
ACR/TFPR Information			
Issue Date 05/06/2008		Sequence 1	Attendance Indicator ACR Data Matches
Student Support Nbr	RCHD07000013N	UCAS Number	Student Status Final
Last Name	Beaumont	Student Status Date	05/15/2008
First Name	Vanessa	Date of Birth	02/08/1986
Course/Fee Information			
Course Start Period	AUT	Course Short Name	STUDY OF RELIGION & THEOLOGY
	SLC Values	Calculated Values	Calculated Attendance
Course Code	V600A		New Record N
Year of Course	3		Other Information
Course Tuition Fee Amt	1,225.00	0.00	<input type="checkbox"/> Revision Indicator
Tuition Fee Loan Payable	533.00	0.00	<input type="checkbox"/> Bursary Student Flag
Tuition Fee Grant Payable	692.00	0.00	<input checked="" type="checkbox"/> Valid NINO Flag
Tuition Fee Student Payable	0.00	0.00	<input type="checkbox"/> Disabled Distance Learner

ACR/TFPR page

You can view the details of ACR or TFPR data for students on this page. All fields on this page, except for the Attendance Indicator field, are view-only.

ACR/TFPR Information

Issue Date	Displays the date that the ACR was issued.
Attendance Indicator/TFPR Record (attendance indicator/Tuition Fee Position Report record)	<p>This field is dynamic.</p> <p>If the data being viewed is from a TFPR file, the field is a check box, which is selected by default and is view-only, and the field name is TFPR Record.</p> <p>If the data being viewed is from an ACR file, the field name is Attendance Indicator. The Attendance Indicator field contains a list of At Fee Code values that can be manually set on this page. The user can manually set this field instead of running the Evaluate ACR process.</p>
Student Status Date	Displays the date that the student's status was assigned or updated.

Course/Fee Information

Course Start Period	Displays the period when the course starts, for example <i>AUT</i> (<i>Autumn</i>).
New Record	Indicates whether the record appeared on a previous ACR.

Course Code	Displays the UCAS code or SLC code that is assigned to the course.
	Note. For this field, and the remaining fields in this group box, values appear in both the SLC Values and Calculated Values columns.
	The values in the SLC Values column are from the context ACR or TFPR record.
	The values in the Calculated Values column appear after the ACR At Fee Evaluation process is run.

Note. The values in the SLC Values column come from the context ACR or TFPR record.

The Calculated Values display once the ACR At Fee Evaluation process is run

Other Information

Revision Indicator	Indicates whether the record has changed since a previous ACR/TFPR.
---------------------------	---

Viewing HEBSS Student Data

Access the HEBSS page (Financial Aid, Student Loans Company, View SLC Student Data, HEBSS).

SSAR	SSAC	ACR/TFPR	HEBSS
ID	FASLC002	Lou Richard	
Institution	PSUNV	Financial Aid Year 2008 - 2009	
HEI Code	RWSA	SLC Acad Year 2008	
HEBSS Information Find View All First 1 of 1 Last			
Assessment Date	02/06/2006	Sequence	1 File Name HEBSS_4.txt
Student Support Nbr	RCHD08000001N	ART ID	49128219921 UCAS Number 10948916 Name/Address
Application/Award Information			
Household Income	1098.92	Automated Award Total	0.00 <input type="checkbox"/> Non-Means Test
Principle Earner Income	4323.92	Manual Award Total	0.00 <input type="checkbox"/> Childcare Grant
Student Support Eligibility	Eligible	Overall Award Total	0.00 <input type="checkbox"/> Adult Dependent Support
Number of Sponsors	2		<input checked="" type="checkbox"/> Evidence Verified
Domicile	ENGLAND		<input type="checkbox"/> Income Assessed Funding
			<input type="checkbox"/> Non-Income Assessed Funding
			<input type="checkbox"/> Bank Details Held
			<input checked="" type="checkbox"/> New Student
Course Information			
UCAS Course Code	C800A	PSYCHOLOGY (SCIENCE)	
SLC Course Code	48225	Campus Code	P
Course Start Date	09/17/2007	Commence Year	2008
Qualification	BSc		
Course Type	OTHER		
Method of Attendance	Full Time		

HEBSS page

You can view the details of the student's HEBSS data on this page. This page is view-only.

Note. For information about the fields in the Application/Award Information group box, refer to the information about the group box in the Manage HEBSS Suspensions section.

HEBSS Information

Assessment Date Displays the date the customer record was entered or updated on the Higher Education (HE) portal.

File Name Displays the data file name from SLC.

Course Information

Qualification Displays the qualification achieved.

- Method of Attendance** Displays the method of attendance. Values are:
- *Full Time*
 - *Part Time*
 - *PGCE* (post graduate)

Viewing HEBSS Name and Address Data

Access the SLC HEBSS Name and Address page (click the Name/Address link on the HEBSS page).

SLC HEBSS Name and Address

ID	FATEST6	Test6 Student6	
Institution	PSUNV	Financial Aid Year 2008 - 2009	Issue Date 01/10/2008
HEI Code	CAMB	SLC Acad Year 2008	Sequence Number 1

First Name Test6

Last Name STUDENT6

Sex Female

Date of Birth 07/13/1988

Address Line 1 14 THE OPENROAD

Address Line 2 HOLLINGWOOD

Address Line 3

City TOWN

County COUNTY

Post Code DE22 1GB

SLC HEBSS Name and Address page

Use this page to help determine whether you are matching to the correct person.

Reconciling Tuition Fee Payments

This section provides an overview of reconciling Tuition Fee payments to HEI's from the SLC and discusses how to:

- View TFRA File Summary.
- View TFRA Data to Student Award Data Comparison.
- View Student Award Details.
- View FA Disbursement Data to SF Item Data Comparison.

- View FA/SF Details.

Understanding Tuition Fee Payments Reconciliation

You can configure the system to use SLC Tuition Fee Loan and Tuition Fee Grant payment data to pay students' tuition fees. HEI's can use the system to reconcile actual payments received from the SLC, represented by TFRA file data, with payments that have been made to students.

Pages Used to Reconcile Tuition Fee Payments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TFRA File Summary	SFA_SLC_TFRA_SUMRY	Financial Aid, Student Loans Company, TFRA File Summary, TFRA File Summary	View the TFRA files that have been loaded for a HEI/SLC academic year.
TFRA Reconciliation	SFA_SLC_TFRA_RECON	Financial Aid, Student Loans Company, TFRA Reconciliation, TFRA Reconciliation	View a comparison of TFRA data and Student Award Data for an Institution/Aid Year/HEI, which maps to the HEI/SLC academic year.
TFRA Student Awards	SFA_SLC_TFRA_AWARD	Financial Aid, Student Loans Company, TFRA Reconciliation, TFRA Student Awards	View the details for student TFRA and award data.
Disbursement Reconciliation	SFA_DISB_SF_RECON	Financial Aid, Student Loans, Company, Disbursement Reconciliation, Disbursement Reconciliation	View a comparison of FA Disbursement data and SF Item data.
FA/SF Details	SFA_DISB_SF_RECON1	Financial Aid, Student Loans Company, Disbursement Reconciliation, FA/SF Details	View the details for student Financial Aid Disbursement data and Student Financials Item data.

Viewing the TFRA File Summary

Access the TFRA File Summary page (Financial Aid, Student Loans Company, TFRA File Summary).

TFRA File Summary			
HEI Code RWSA			
SLC Acad Year 2008			
Grand Total 22,490.00			
Remittance File List			
Customize Find First 1-2 of 2 Last			
File Name	Payment Date	Payment Type	Total Fee Amount
1 RWSA_2008_FT_G_08062008_remittance.dat	04/08/2008	Grant	9,745.00
2 RWSA_2008_FT_T_08052008_remittance.dat	04/08/2008	Loan	12,745.00

TFRA File Summary page

Use this page to learn which files have been loaded for the current HEI and SLC academic year.

Viewing the TFRA Data to Student Award Data Comparison

Access the TFRA Reconciliation page (Financial Aid, Student Loans Company, TFRA Reconciliation).

TFRA Reconciliation		TFRA/Student Awards			
Academic Institution	PSUNV	HEI Code	RWSA		
Aid Year	2009	SLC Acad Year	2008		
TFRA and Award Grand Totals					
Payment Type	Item Type Group	TFRA Amount	Accept Amount	Difference Amount	Currency Code
Grant	SLCTFG	9,745.00	7,525.00	2,220.00	GBP
Loan	SLCTFL	12,745.00	11,450.00	1,295.00	GBP
Filter Option					
<input checked="" type="radio"/> All Records <input type="radio"/> Payment Type <input type="radio"/> Student Support Number <input type="radio"/> ID <input type="button" value="Search"/>					

TFRA Reconciliation page

Use this page to compare TFRA data to Student Award Data for a particular institution, aid year, and HEI combination.

TFRA and Award Grand Totals

This group box lists the totals by payment type, such as grant or tuition. The page uses the TFRA parameters set up on the Student Loans Company Setup page to associate item type groups with payment types.

Filter Option

Use the Filter Option group box to filter results by Payment Type, Student Support Number, or ID. Click the Search button to access the TFRA Student Awards page.

Viewing Student Award Details

Access the TFRA Student Awards page (Financial Aid, Student Loans Company, TFRA Reconciliation, and click Search).

TFRA Reconciliation		TFRA/Student Awards				
Academic Institution PSUNV		HEI Code RWSA				
Aid Year 2009		SLC Acad Year 2008				
TFRA Records with no Student ID or Awards Customize Find View All First 1-3 of 3 Last						
Student Information Course Information Other Information Filter						
ID	Student Support Nbr	Last Name	First Name	TFRA Amount	Payment Type	
1 FASLC024	RCHD08000013N	Dorwin	Chuck	1,225.00	Grant	
2 FASLC026	RCHD08000015N	Dion	Geoffrey	1,225.00	Grant	
3	RCXX07000013N	Hsieh	Athena	1,225.00	Loan	
Student Awards with no TFRA Data Customize Find View All First 1 of 1 Last						
ID	Student Support Nbr	Name	Item Type Group	Accept Amount	Disbursed Amount	
1 FASLC013	RCHD07000003N	Grainger, Ernest Lou	SLCTFL	0.00	0.00	
TFRA and Award Data Comparison Customize Find View All First 1-8 of 8 Last						
ID	Student Support Nbr	Payment Type	TFRA Amount	Accept Amount	Difference	Disbursed Amount
1 FASLC003	RCHD08000002N	Loan	3,070.00	3,000.00	70.00	0.00
2 FASLC002	RCHD08000001N	Loan	3,000.00	3,000.00		0.00
3 FASLC009	RCHD08000008N	Loan	1,225.00	1,225.00		0.00
4 FASLC016	RCHD07000006N	Loan	1,225.00	1,225.00		0.00
5 FASLC021	RCHD08000010N	Grant	1,225.00	1,225.00		612.50
6 FASLC022	RCHD08000011N	Loan	3,000.00	3,000.00		0.00
7 FASLC027	RCHD08000016N	Grant	3,000.00	3,000.00		1,500.00
8 FASLC013	RCHD07000003N	Grant	3,070.00	3,300.00	-230.00	1,650.00

TFRA/Student Awards page

TFRA Records with no Student ID or Awards

This group box lists TFRA data that is not associated with a student ID or does not have a matching SLC Financial Aid Award. For example, a TFRA record was received but could not be matched with a student in the system. Or a TFRA record with a Student Support Number is matched to a student ID, but that student does not have any SLC Financial Aid Awards. You can view details about the TFRA Records in this group box by clicking on the Student Information, Course Information, and Other Information tabs.

Student Awards with no TFRA Data

This group box lists students who have SLC Financial Aid awards that do not have matching TFRA data.

TFRA and Award Data Comparison

This group box lists students who have TFRA data and SLC Financial Aid award data and displays differences, if any, between the two.

Viewing the FA Disbursement Data to SF Item Data Comparison

Access the Disbursement Reconciliation page (Financial Aid, Student Loans Company, Disbursement Reconciliation).

Disbursement Reconciliation **FA/SF Details**

Academic Institution PSUNV PeopleSoft University

Aid Year 2009 Financial Aid Year 2008 - 2009

Grand Totals			
<u>Disbursed Amount</u>	<u>Item Amount</u>	<u>Difference Amount</u>	<u>Currency Code</u>
\$53,744.00	\$-53,744.00	\$0.00	USD

Filter Option

☒ All Records
☐ Item Type Group
☐ Item Type
☐ ID

Search

Disbursement Reconciliation page

Use this page to compare Financial Aid disbursement data to Student Financials item data.

Filter Option

Use the Filter Option group box to filter results by Item Type Group, Financial Aid Item Type, or ID. Press the Search button to access the FA/SF Details page.

Note. You can use this page to access information about any Financial Aid Item Types. It is not limited to SLC Item Types.

Viewing FA/SF Details

Access the FA/SF Details page (Financial Aid, Student Loans Company, Disbursement Reconciliation, and click Search).

Disbursement Reconciliation

FA/SF Details

Academic Institution PSUNV PeopleSoft University

Aid Year 2009 Financial Aid Year 2008 - 2009

Detail Information Totals

Disbursed Amount	Item Amount	Difference Amount	Currency Code
\$53,744.00	\$-53,744.00	\$0.00	USD

Detail Information

Customize | Find | View All | 1-8 of 44 | First | Last

ID	Item Type	Disbursed Amount	Item Amount	Difference Amount	Currency Code
1 FAIV0046	900000000100	\$400.00	\$-400.00	\$0.00	USD
2 FAIV0046	900000000102	\$750.00	\$-750.00	\$0.00	USD
3 FAIV0046	900000000105	\$500.00	\$-500.00	\$0.00	USD
4 FAIV0046	900000000107	\$3,500.00	\$-3,500.00	\$0.00	USD
5 FAIV0046	900000000311	\$1,773.00	\$-1,773.00	\$0.00	USD
6 FAIV0047	900000000100	\$600.00	\$-600.00	\$0.00	USD
7 FAIV0047	900000000104	\$200.00	\$-200.00	\$0.00	USD
8 FAIV0047	900000000105	\$500.00	\$-500.00	\$0.00	USD

FA/SF Details page

Use this page to view disbursement details.

Updating HEI Course Database Data

This section provides an overview of the HEI Course Database and discusses how to exchange HEI Course Database data.

Understanding the HEI Course Database

HEIs in the UK report information on all their courses of study (programmes) to the SLC. This data must be updated annually.

The course data is general, such as costs or descriptions of courses of study, and is not specific to the student. The SLC uses this course data when processing students' applications for support.

The SLC provides an XML-based web service to exchange this information with HEIs. The SLC provides the current HEI Course Database data to the HEI, and the HEI must provide the SLC with updated information.

The SLC requests the HEI Course Database updates from HEIs each academic year.

Page Used to Exchange HEI Course Database Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Exchange HEI Course Database Data	SFA_SLC_RC_CD	Financial Aid, Student Loans Company, HEI Course Database, Exchange HEI Course DB Data, Exchange HEI Course Database Data	Exchange HEI Course Database data.

Exchanging HEI Course Database Data

Access the Exchange HEI Course Database Data page (Financial Aid, Student Loans Company, HEI Course Database, Exchange HEI Course DB Data, Exchange HEI Course Database Data).

Exchange HEI Course Database Data page

Course Database Parameters

HEI Code (higher education institution code)

Select a value in this mandatory field.

The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.

SLC Acad Year (Student Loans Company academic year)

Select a value in this mandatory field.

The prompt view restricts the values from which you can select to those found in the Student Loans Company Setup component.

Action

Select a web service action from the following:

- *Download Course Catalog:*

Select to use the web service to retrieve HEI Course Database data for the designated HEI code and SLC academic year and store the data in system tables.

You can then update data in the Maintain HEI Institution Data (SFA_SLC_CD_INST), Maintain HEI Location Data (SFA_SLC_CD_LOC), and Maintain HEI Course Data (SFA_SLC_CD_CRSE) components.

Selecting this action retrieves Qualification values (the *Fetch Qualifications* action) as well as downloading course catalog data.

Note. *Download Course Catalog* should be the first action taken in the HEI Course Database process.

- *Fetch Qualifications:*

Select to use the web service to retrieve only the valid values that can be used to update the Qualifications field on the Maintain HEI Courses page. Select this action if the Qualifications list of values needs to be updated after the initial Download Course Catalog completes.

- *Submit Data Changes:* Select to use the web service to send updates for any changed Location, Institution, Year, or Course data.

Maintaining HEI Data

This section provides an overview of HEI data and discusses how to:

- View and update HEI institution data.
- View and update HEI location data.
- View and update HEI course data.

Understanding HEI Data

Use the Maintain HEI Institution Data, Maintain HEI Locations, and Maintain HEI Courses components to:

- Retrieve HEI Course Database data from the SLC using the web service.
- Maintain HEI Course Database data.
- Send HEI Course Database data updates to the SLC.

Common Elements Used in this Section

Get SLC Data	Click this button to retrieve the latest information from the SLC.
Send to SLC	To send updated data to the SLC, add a row, update the relevant editable fields, and click the Send to SLC button. When the SLC receives updated information, it sends a result number and result message.
Result Number	Displays the result code number that the SLC sends to the HEI when it receives updated information from the HEI.
Result Message	Displays an explanation of the result reply from the SLC.

Pages Used to View and Update HEI Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain HEI Institution Data	SFA_SLC_CD_INST	Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Institution Data, Maintain HEI Institution Data	View and update HEI institution data.
Maintain HEI Locations	SFA_SLC_CD_LOC	Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Locations, Maintain HEI Locations	View and update HEI location data.
Maintain HEI Courses	SFA_SLC_CD_CRSE	Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Courses, Maintain HEI Courses	View and update HEI course data.

Viewing and Updating HEI Institution Data

Access the Maintain HEI Institution Data page (Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Institution Data, Maintain HEI Institution Data).

Maintain HEI Institution Data

SLC Acad Year 2009

HEI Code PSCD

Get SLC Data

Institution Year Information

Find | View All

First 2 of 2 Last

Sequence Number 2

Fee Cap 3145

Predicted Courses

☒ Variable Fees

Send to SLC

Last Updated

Submit Result

Result Number 0

Result Message

Institution Details

Find | View All

First 2 of 2 Last

Sequence Number 2

HEI Name PEOPLESOFT UNIVERSITY

HEI Shortname PEOPLESOFT UNIVERSITY

Country Name ENGLAND

UCAS College Code P01

Last Updated

Submit Result

Result Number 0

Result Message

Maintain HEI Institution Data page

Institution Year Information

- Fee Cap

Enter the Office for Fair Access cap for fees.
- Predicted Courses

Enter the predicted number of courses offered by the institution.
- Variable Fees

Select to indicate that the institution offers variable fees.
- Last Updated

Displays the date and time that this record was last updated.

Institution Details

- HEI Name, Country Code, and UCAS College Code

Enter the institution name, country code, and UCAS college code.

Viewing and Updating HEI Location Data

Access the Maintain HEI Locations page (Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Locations, Maintain HEI Locations).

Maintain HEI Locations

SLC Acad Year 2009

HEI Code PSCD

Campus Code B

☐ Franchise Location

Get SLC Data

Location Details

Find | View All

First 1 of 1 Last

Sequence Number 1

Last Updated 2008-04-28T13:16:01.000Z

☒ Active

☐ Primary Location

Location Name

PEOPLESOFT UNIVERSITY CAMPUS B

Address Line 1

100 ADMINISTRATION

Address Line 2

ADMIN PLAZA

Address Line 3

REGISTRATION OFFICE

Address Line 4

CAMPUS ROAD

Address Line 5

Post Code

M02 5PS

Phone Number

0333 555 4445

Fax Number

0333 555 7778

Email Address

ADMIN@PSUNV.UK

Send to SLC

Submit Result

Result Number 0

Result Message

Maintain HEI Locations page

Location Details

- Active

Select to indicate that the location is active.
- Primary Location

Select to indicate that the location is a primary location for the institution.

Viewing and Updating HEI Course Data

Access the Maintain HEI Courses page (Financial Aid, Student Loans Company, HEI Course Database, Maintain HEI Courses, Maintain HEI Courses).

Maintain HEI Courses

SLC Acad Year 2009
HEI Code MANU

Course Short Name ACCOUNTING Get SLC Data

Course Information

Find | View All First 1 of 1 Last

SLC Course Code 48375 Sequence Number 1 Last Updated 2008-04-28T13:16:02.000Z

Course Title

Course Description BACHELOR OF ARTS IN ECONOMICS

Course Duration 3 Method of Attendance Full Time UCAS Suffix A

Course Type Other Course Status Open Send to SLC

Qualification BEcon UCAS Course ☒

Year and Term Details

Find | View All First 1 of 3 Last

*Year of Course 1 Fee Cap

*Term Number	Campus Code	Start Date	End Date		
1	A	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	A	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	A	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Other Codes

*Code Type	Course Code		
ucas	N420	<input type="button" value="+"/>	<input type="button" value="-"/>
jacs	N420	<input type="button" value="+"/>	<input type="button" value="-"/>

Submit Result

Result Number 0

Result Message

Maintain HEI Courses page

Course Information

SLC Course Code (Student Loans Company course code) The value in this field is assigned by the SLC. The value is blank when a HEI sends information about a new course to the SLC.

Method of Attendance Enter a method of attendance. Values are:

- *FE (Full Time and Extended Attendance)*
- *FP (Full Time and Part Time Attendance)*
- *FS (Full Time Plus Sandwich Attendance)*
- *FT (Full Time Attendance)*
- *OT (Unknown Method of Attendance)*
- *PT (Part Time Attendance)*

UCAS Suffix Displays the campus code/location.

Course Type	Enter a course type. Values are: <ul style="list-style-type: none">• <i>ACCELERATED</i> (<i>Course compresses a two year course into one year of study</i>)• <i>ART TEACHER</i>• <i>EMERGENCY</i>• <i>FRANCHISED</i>• <i>OTHER</i>• <i>PART TIME</i>• <i>PGCE</i> (<i>Post Graduate Certificate In Education</i>)
Course Status	Enter a course status. Values are: <ul style="list-style-type: none">• <i>C</i> (<i>Closed</i>)• <i>O</i> (<i>Open</i>)
Qualification	Select from a list of values that appear by default from the SLC web service. The value indicates the type of degree to which the course leads.
UCAS Course	Select this check box if the course is a UCAS course.

Year and Term Details

Fee Cap	Enter the maximum tuition fees to be charged for the designated year of the course.
Term Number	Enter the term number within the year of the course.
Campus Code	Enter the campus code that applies to the term for which you entered a number in the Term Number field.
Start Date and End Date	Enter the start date and end dates for the term for which you entered a number in the Term Number field.

Other Codes

Code Type	Enter a code type. Values are: <ul style="list-style-type: none">• <i>ucas</i>• <i>jacs</i>• <i>ucasSuffix</i>
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Chapter 43

Processing Return of Title IV Funds

This chapter provides a list of common elements and discusses how to:

- Manage data to calculate return of Title IV aid.
- Use the Return of Funds worksheet.
- Track student and school return information.
- Track return of Title IV funds.
- Review return of Title IV funds student summary.
- Generate return of Title IV funds withdrawal report.

See Also

Chapter 17, "Setting Up Return of Title IV Funds," Understanding Return of Title IV Funds, page 475

Common Elements Used in This Chapter

Date of Withdrawal	Indicates one of the following: the last date of recorded attendance, the date the student began the withdrawal process, the date the student provided your school with the intent to withdraw, or the midpoint of the payment period if the student unofficially withdraws. The system displays the default date based on the date that was established in Campus Solutions Student Records.
Undetermined Withdrawal Date	Select for students who have withdrawn unofficially. The system displays the midpoint of the payment period in the Date of Withdrawal field if the student unofficially withdraws. Update this field if you want to use a different withdrawal date. For example, you can use the date when the student last attended an academic-related event if this date was verified by your institution.
Institutional Determination Dt (institutional determination date)	Indicates the withdrawal date determined by the financial aid office.
ID	Indicates the unique identification code for the student.
User ID	Displays the identification code of the last person to update the page.

Name	Displays the name of the student.
Last Update Timestamp	Displays the date and time the page was last updated.
Days Elapsed	After an institution determines the date of withdrawal, the system displays the number of days passed since the student withdrew.

Managing Data to Calculate Return of Title IV Aid

This section discusses how to manage data to calculate the return of Title IV aid.

Pages Used to Manage Data to Calculate Return of Title IV Aid

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Return TIV Aid	STDNT_RTRN_TIV_AID	Financial Aid, Return to TIV Funds HERA, Create Worksheet, Return TIV Aid Funds Worksheet, Return TIV Aid	Manage the return of Title IV aid. Add a student who has withdrawn, calculate the withdrawal percentage, view various dates from different sources, view the payment or enrollment period, or view term information.
Packaging Status Summary	STDNT_AID_PACKAGE	Click the Student Status link on the Return TIV Aid page.	Review the student's need, budget, and award or to change the student's packaging status.
FA Term	STDNT_FA_TERM	Click the FA Term link on the Return TIV Aid page.	View a student's term information, add a new term for a student, or build the student's financial aid term.
Last Updated	STDNT_RTRN_TIVSEC5	Click the Last Updated link on the Return TIV Aid page.	View the user's ID and the date and time of the last update made to the Return TIV Aid page.

Managing the Return of Title IV Aid

Access the Return TIV Aid page (Financial Aid, Return to TIV Funds HERA, Create Worksheet, Return TIV Aid Funds Worksheet, Return TIV Aid).

Return TIV Aid		Return of Funds Worksheet		Student/School Return	
Logan Safe		ID:		FAIV0046	
Institution: PSUNV PeopleSoft University		Aid Year:		2009	
Term: 0605 2008 Summer		Program Type:		Credit Hour Program	
Student Status FA Term				<input type="button" value="Calculate All"/>	
Summary					
Date of Withdrawal:		<input type="text" value="07/01/2008"/> <input type="button" value="B1"/>		<input type="checkbox"/> Undetermined Withdrawal Date	
*Overall Status: <input type="text" value="Pending"/>		*Institutional Determination Dt: <input type="text" value="07/11/2008"/> <input type="button" value="B1"/>		Days Elapsed: 101 Last Updated	
Period Information					
<input type="radio"/> Payment Period		<input checked="" type="radio"/> Enrollment Period			
		*Start Date: <input type="text" value="05/23/2008"/> <input type="button" value="B1"/>		*End Date: <input type="text" value="08/14/2008"/> <input type="button" value="B1"/>	
Term/Session Information					
Term: 0605		Withdraw Date:		60 Pct Dt: 07/11/2008	
Session: <input type="text" value=""/> <input type="button" value="B1"/>		Withdraw Date:		60 Pct Dt:	
FA Term Withdraw Date:				Term Begin Date: 05/23/2008	
				Term End Date: 08/14/2008	
				FA Term Academic Career: UGRD	

Return TIV Aid page

The fields are populated with data from the Term Session table and Student Records.

Student Status Click to access the Packaging Status Summary page to review the student's need, budget, and award or to change the student's packaging status.

FA Term Click to access the Financial Aid Term page to view a student's term information, add a new term for a student, or build the student's financial aid term. If the student withdraws and the withdrawal date defined by Student Records changes, you must rebuild the FA Term.

Calculate All Click to update and populate the fields with the student's calculated withdrawal information. The system displays the withdrawal status of the student for the specified term and calculates the actual values for the amount of earned aid, amount of unearned aid, and amount of aid to be returned. When you click this link, the system uses the setup and award data specific to the student. If you change the start and end dates from the Return TIV Aid page, click the Calculate All button to update the values on the Return of Funds Worksheet page.

Summary

Days Elapsed After an institution determines the date of withdrawal, the system calculates and displays the number of days passed since the student withdrew. The days are calculated using the Institutional Determination Date field as a starting date.

Last Updated Click to access the Last Updated page to view the user ID and last update timestamp for the last update made to the page.

Overall Status	<p>Displays the student's withdrawal status. The values are:</p> <p><i>Pending</i>: The calculation and the return of Title IV funds are still in progress. The default status is <i>Pending</i> until you manually change the status to <i>Complete</i>.</p> <p><i>Complete</i>: Indicates that the calculation, the student notification, and the return of Title IV funds has occurred. After you set the status to <i>Complete</i>, affected fields and pages become view-only.</p>
Date Form Completed	<p>When you click the Calculate All button on this page to calculate the student's withdrawal percentage, the system displays the date this occurred in this field. The date is set to the current date by default when you change the overall status to <i>Complete</i>. The user ID is also updated when you change the status to <i>Complete</i>. You can view the user ID update on the page when you click the Last Updated link.</p>
Period Information	
Payment Period	<p>Select to indicate nonstandard periods or terms. A nonstandard period or term is defined as a term that is not a quarter, semester, or trimester. It can be a payment period or a period of enrollment. A payment period can consist of more than one term.</p>
Enrollment Period	<p>Select to indicate the academic period determined by an institution for which charges are assessed. The enrollment period is the length of the term.</p>
Start Date and End Date	<p>Displays the beginning and ending date of the payment or enrollment period. The system uses the start and end date in the actual Return of Title IV Funds calculation.</p> <hr/> <p>Note. Because you can change the enrollment period start and end dates that are used by the system to calculate the Title IV percentage, you should establish procedures to define how these dates should be changed.</p> <hr/>

Term Session Information

Term	Displays the identification number for the term. A term is a period of time designated as an instructional accounting period.
Withdraw Date	Displays the date the student withdrew from the term. The value is from the Student Records Student Career Term table.
60 Pct Dt (60 percent date)	Displays the default value from the Term Session table. This is the date when a student would have completed 60% of the credit/clock hour of the program for the session.
Term Begin Date	Displays the beginning date of the term.

Session	Enter the session from which the student has withdrawn. A session is a class scheduling, enrollment control time period within an academic term. All classes are offered within a session and a session belongs to a term for billing and other administrative purposes.
Term End Date	Displays the ending date of the term.
FA Term Withdraw Date	Displays the date the student withdrew from the term. The Financial Aid Term table provides the FA term withdrawal date. Student Records determines the date.
FA Term Academic Career	Displays the grouping of all academic work undertaken by a student at an institution. This information is from the Financial Aid Term table.

See Also

Chapter 34, "Reviewing Awards," Reviewing Student Packaging Status by Date, page 1208

Chapter 19, "Managing Financial Aid Terms," page 505

Using the Return of Funds Worksheet

This section discusses how to:

- Generate a valid calculation.
- Recalculate TIV aid information.
- Recalculate percentage of TIV aid earned using credit hours.
- View institutional and budget charges.
- Calculate return amounts.
- Review loan debts for withdrawn students.

Pages Used to Generate a Valid Calculation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Return of Funds Worksheet	STDNT_RTRN_TIV_WK1N	Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Return of Funds Worksheet	Enter values in the editable fields to generate a valid calculation or to recalculate the totals due by the student and school.

Page Name	Definition Name	Navigation	Usage
Calculate TIV Aid Information	STDNT_RTRN_TIVSEC1	Click the Detail link to the right of the E. Total TIV Aid Disb field on the Return of Funds Worksheet page.	Recalculate or view the E. Total TIV Aid Disb field. The information displayed under Student's TIV Aid Information is from the Student Award Disbursement table and is used to populate the fields under Student's TIV Aid Amounts.
Calculate Pct. TIV Aid Earned	STDNT_RTRN_TIVSEC2	Click the Detail link to the right of the H. Pct. TIV Aid Earned field on the Return of Funds Worksheet page.	Recalculate the Percentage of Title IV Aid Earned field and view the Holiday Adjustment field.
Calculate Charge Information	STDNT_RTRN_TIVSEC6	Click the Detail link to the right of the L. Total Institutional Chrgs (charges) field on the Return of Funds Worksheet page.	View institutional and budget charges.
Calculate Return Amounts	STDNT_RTRN_TIVSEC4	Click the Detail link to the right of P. Total School Must Return field on the Return of Funds Worksheet page.	View amounts to returned by the institution.
Return of Loan Funds	STDNT_RTN_TIVSEC7N	Click the Detail link for the R. Student Loan Repayment Amount field on the Return of Funds Worksheet.	Enter debt totals for various loan types for withdrawn students to reviewing loan debts.

Generating a Valid Calculation

Access the Return of Funds Worksheet page (Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Return of Funds Worksheet).

Return TIV Aid	Return of Funds Worksheet	Student/School Return	Post-Withdrawal Disbursement	Return TIV Aid Notes
Logan Safe		ID:	FAIV0046	
Institution:	PSUNV PeopleSoft University	Aid Year:	2009	
Term:	0605 2008 Summer	Program Type:	Credit Hour Program	
Calculate	Calculate All	Date of Withdrawal:	07/01/2008	Institutional Determination Dt: 07/11/2008
Worksheet Data				
E. Total TIV Aid Disb:	5474.34	Detail	N. Unearned Inst Charges:	3564.80
F. Total TIV Grant Aid:	4883.34		O. Amt Due From School:	3049.21 Detail
G. Total TIV Aid:	5474.34		P. Total School Must Return:	591.00
H. Pct. TIV Aid Earned:	44.30	Detail	Q. Amt Due From Student:	0.00
I. TIV Aid Earned:	2425.13		R. Stdnt Loan Repaymnt Amt:	0.00 Detail
J. TIV Aid to Disburse:	0.00		S. Initial TIV Grant Amount:	0.00
K. TIV Aid to Return:	3049.21		T. TIV Grant Protection Amt:	0.00
L. Total Institutional Chrgs:	6400.00	Detail	U. TIV Grant Return Amt:	0.00 Detail
M. Pct TIV Aid Unearned:	55.70		Action:	Complete School Return of Funds

Return of Funds Worksheet page

Use the Detail links to view or recalculate specific amounts.

Click Calculate to recalculate the values based on the adjustments you made to the percentages.

Click Calculate All to update and populate the fields with the student's calculated withdrawal information. The system displays the withdrawal status of the student for the specified term and calculates the actual values for the amount of earned aid, unearned aid, and aid to be returned. The system uses the setup and award data specific to the student.

If you change the start and end dates from the Return of TIV Aid page, click Calculate All to update the values on the Return of Funds Worksheet page.

E. Total TIV Aid Disb (E. total Title IV aid disbursed) Displays Title IV Grant and Loan Programs amounts to be disbursed for grants, amounts that could have been disbursed for grants, net amounts disbursed for loans and net amounts that could have been disbursed for loans. Totals based on the actual federal worksheet are also displayed.

F. Total TIV Grant Aid (F. total Title IV grant aid) Displays grant aid disbursed and amount that could have been disbursed.

G. Total TIV Aid(G. total Title IV aid) Displays grant and loan aid disbursed and amount that could have been disbursed.

H. Pct. TIV Aid Earned (H. percent Title IV aid earned) Displays percentage of period of enrollment completed.

I. TIV Aid Earned (I. Title IV aid earned)	Displays aid earned by the student based on percentage of enrollment period completed.
J. TIV Aid to Disburse (J. Title IV aid to disburse)	Displays amount of aid that could have been disbursed.
K. TIV Aid to Return (K. Title IV aid to return)	Displays amount aid to be returned.
L. Total Institutional Chrgs (L. total institutional charges)	Displays the value of the charges your institution set up in the Institutional Charges setup page. Institutional costs are defined as charges—the cost of attendance—a student must pay to the institution directly. Whether you use the actual or budgeted charges, the system displays the value for the institutional charges you defined in your setup.
M. Pct TIV Aid Unearned (M. percent title IV aid unearned)	Displays the amount to be returned based on the percentage of the unearned aid.
N. Unearned Inst Charges (N. unearned institutional charges)	Displays the amount of aid that must be returned for unearned institutional charges. For example, tuition is an institutional charge. If a student withdraws at 10% of the term, the student earns 10% of the charges for tuition. The remaining 90% is unearned.
O. Amt Due From School (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV program. The institution determines its share of unearned funds first.
P. Total School Must Return:	Displays the total loans the school must return.
Q. Amt Due From Student (Q. amount due from student)	Displays the amount of aid the student must return to the Title IV program. The student returns the difference between the Title IV aid to be returned and the amount of Title IV aid due by the institution. For example, if the returned aid is 1000.00 USD and your institution returns 600.00 USD, the initial unearned calculation for the student to return is 400.00 USD.
R. Stdnt Loan Repaymnt Amt: (R. Student loan repayment amount)	Displays the total amount the student must repay, which consists of loan funds the student has earned, or unearned loan funds that the school is not responsible for repaying, or both.
S. Initial TIV Grant Amount: (S. initial Title IV grant amount)	Displays the Initial amount of Title IV grants the student must return.
T. TIV Grant Protection Amt: (T. Title IV grant protection amount)	Displays the amount of Title IV grant protected using the value in F. Total TIV Grant Aid and applying the 50 percent grant protection.
U. TIV Grant Return Amt: (U. Title IV grant return amount)	Displays the net Title IV grant funds that the student must return.

Action

After you calculate the Return of Title IV Funds, the system displays a note as a reminder to update the tracking fields on the Student/School Return page or the Post-Withdrawal Disbursement page based on what has occurred with the student.

Recalculating TIV Aid Information

Access the Calculate TIV Aid Information page (click the Detail link to the right of the E. Total TIV Aid Disb field on the Return of Funds Worksheet page).

Calculate TIV Aid Information		
Title IV Grant Programs		
	Amount Disbursed	Amt Could Have Been Disbursed
1. Pell Grant:	133.34	0.00
2. Academic Comp:	750.00	0.00
3. National SMART:	0.00	0.00
4. FSEOG:	500.00	0.00
5. TEACH Grant:	3500.00	0.00
	4883.34	0.00
	Subtotal A.	Subtotal C.

Title IV Loan Programs		
	Net Amount Disbursed	Net Amt Could Have Been Disb
6. Unsub FFEL/Direct:	0.00	0.00
7. Sub FFEL/Direct Staff:	591.00	0.00
8. Perkins:	0.00	0.00
9. Grad PLUS:	0.00	0.00
10. PLUS:	0.00	0.00
	591.00	0.00
	Subtotal B.	Subtotal D.

A.	4883.34
+ B.	591.00
<hr/>	
= E.	5474.34
A.	4883.34
+ C.	0.00
<hr/>	
= F.	4883.34
A.	4883.34
B.	591.00
C.	0.00
+ D.	0.00
<hr/>	
= G.	5474.34
Calculate Aid	

Calculate TIV Aid Information page

The system displays grant and net loan amounts that are disbursed and that could have been disbursed. Totals based on the actual federal worksheet are also displayed

Recalculating Percentage of TIV Aid Earned Using Credit Hours

Access the Calculate Pct. TIV Aid Earned page (click the Detail link to the right of the H. Pct. TIV Aid Earned field on the Return of Funds Worksheet page).

Calculate Pct. TIV Aid Earned					
Percentage of TIV Aid Earned					
		Override			
Date of Withdrawal:	05/30/2008	Completed Days:	<input type="text" value="9"/>	<input type="checkbox"/> Y	
Period Start Date:	05/23/2008	Student Adjustment:	<input type="text" value="1"/>		
Period End Date:	08/14/2008	Total Days:	<input type="text" value="80"/>	<input type="checkbox"/> Y	
		Period Adjustment:	<input type="text" value="7"/>	<input type="checkbox"/> Y	
Days Earned / In Term					
8 / 73		H. Pct. TIV Aid Earned:	11.00	<input type="button" value="Calculate"/>	
Holiday Adjustment					
Holiday Schedule:		PSS Academic Holiday Schedule			
		Find View All First 1-3 of 5 Last			
Holiday:	06/11/2008	Hours:	24.00		
Holiday:	06/12/2008	Hours:	24.00		
Holiday:	06/13/2008	Hours:	24.00		
Holiday Adjustment (Days):		5 (0)	0.00	<input type="button" value="Calculate"/>	

Calculate Pct. TIV Aid Earned page

Percentage of Title IV Aid Earned

Date of Withdrawal	Displays the student's day of withdrawal as entered on the Return of TIV Aid page.
Period Start Date	Displays the first day of the term or payment period.
Period End Date	Displays the last day of the term or payment period.
Completed Days	Displays the number of days between the Period Start Date and student's Date of Withdrawal. Enter a value in this field to manually override and set the Override flag to "Y".
Student Adjustment	Enter a value in this field to exercise professional judgment by adjusting the student's completed days.
Total Days	Displays the number of days between the Period Start Date and Period End Date, inclusive. Enter a value in this field to manually override and set the Override flag to "Y".

Period Adjustment	Displays the adjustment that is required for scheduled holidays of five consecutive days or more. The system displays 0 if no holidays are scheduled consecutively for 5 or more days. Enter a value in this field to manually override and set the Override flag to "Y".
Days Earned / In Term	Displays the number of completed days divided by the total days after performing a calculation.
	Note. This field is reset to zero every time you access the component. Click Calculate to update.
H. Pct TIV Aid Earned (H. percent Title IV aid earned)	Displays the percentage of the period of enrollment or payment period that the student completed.
Calculate	Click to recalculate the percentage of the period of enrollment or payment period that the student completed if updating Completed Days, Student Adjustment, Total Days, or Period Adjustment.

Holiday Adjustment

Holiday Schedule	Displays the name of the holiday schedule defined and set up in human resources for that term. Student Records associates this schedule to terms and sessions used in Campus Solutions.
Holiday	Displays the date of the holiday. The system lists all holidays, not just those that are consecutive.
Hours	Displays the number of clock hours for the holiday.
Holiday Adjustment (Days)	Displays the number of consecutive holidays defined in the holiday schedule.
Calculate	Click to recalculate the adjustment for holidays if you made a change to the start and end dates of the payment or enrollment period. The system determines whether there are any changes to the holiday schedule based on the new start and end dates.

Note. The system does not support clock hours even though you can select clock hours as a program type when you enter the access requirements to enter the Return of TIV Aid page.

Viewing Institutional and Budget Charges

Access the Calculate Charge Information page (click the Detail link to the right of the L. Total Institutional Chrgs (charges) field on the Return of Funds Worksheet page).

Calculate Charge Information																																																			
<table border="1"> <thead> <tr> <th colspan="2">Stdnt Institutional Chg Amt</th> </tr> </thead> <tbody> <tr> <td>Tuition and Fees:</td> <td>6000.00</td> </tr> <tr> <td>Room and Board:</td> <td>0.00</td> </tr> <tr> <td>Other:</td> <td>400.00</td> </tr> </tbody> </table>	Stdnt Institutional Chg Amt		Tuition and Fees:	6000.00	Room and Board:	0.00	Other:	400.00	<table border="1"> <thead> <tr> <th colspan="2">Student's Budget Charge Information</th> <th>Find View All</th> <th>First</th> <th>1-2 of 2</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>ChargeType:</td> <td>Tuition</td> <td>Academic Career</td> <td colspan="3">UGRD</td> </tr> <tr> <td>Category:</td> <td>TUIT</td> <td>Item Code:</td> <td colspan="3">TUITU1</td> </tr> <tr> <td>Amount:</td> <td colspan="5">6000.00</td> </tr> <tr> <td>ChargeType:</td> <td>Other</td> <td>Academic Career</td> <td colspan="3">UGRD</td> </tr> <tr> <td>Category:</td> <td>BOOK</td> <td>Item Code:</td> <td colspan="3">BOOK01</td> </tr> <tr> <td>Amount:</td> <td colspan="5">400.00</td> </tr> </tbody> </table>	Student's Budget Charge Information		Find View All	First	1-2 of 2	Last	ChargeType:	Tuition	Academic Career	UGRD			Category:	TUIT	Item Code:	TUITU1			Amount:	6000.00					ChargeType:	Other	Academic Career	UGRD			Category:	BOOK	Item Code:	BOOK01			Amount:	400.00				
Stdnt Institutional Chg Amt																																																			
Tuition and Fees:	6000.00																																																		
Room and Board:	0.00																																																		
Other:	400.00																																																		
Student's Budget Charge Information		Find View All	First	1-2 of 2	Last																																														
ChargeType:	Tuition	Academic Career	UGRD																																																
Category:	TUIT	Item Code:	TUITU1																																																
Amount:	6000.00																																																		
ChargeType:	Other	Academic Career	UGRD																																																
Category:	BOOK	Item Code:	BOOK01																																																
Amount:	400.00																																																		
L. Total Institutional Chrgs:	6400.00	Total Institutional Charges:	6400.00																																																
			Calculate																																																

Calculate Charge Information page

Charge Type	Displays institutional charges for the student associated with an item type group for the term.
Category	Displays the budget category for which the charge type is associated.
Academic Career	Displays the grouping of all academic work undertaken by a student at an institution.
Item Code	Displays a budget item within a budget category.
Amount	Displays the charge amount for the charge type.
L. Total Institutional Chrgs (L. total institutional charges)	Displays the value of the charges your institution set up in the Institutional Charges setup page. Institutional costs are defined as charges a student must pay to the institution directly. Whether you use the actual or budgeted charges, the system displays the value for the institutional charges you defined in your setup.
Total Institutional Charges	Displays the total value of the charges based on specific charge types for the Return of Title IV calculation for the student.
Calculate	Click to recalculate total institutional charges and to update the Return of Funds Worksheet page.

See Also

[Chapter 4, "Setting Up Student Budgets," Defining Budget Items, page 58](#)

Calculating Return Amounts

Access the Calculate Return Amounts page (click the Detail link to the right of O. Amt. Due From School or P. Amount Due From Student fields on the Return of Funds Worksheet page).

Calculate Return Amounts	
School Return of Funds	
1. Unsub:	0.00
2. Sub:	591.00
3. Perkins:	0.00
4. Grad PLUS:	0.00
5. PLUS:	0.00
6. Pell:	133.34
7. Acad Comp:	750.00
8. SMART:	0.00
9. FSEOG:	500.00
10. TEACH:	1074.87
O. By School:	3049.21
P. School Rtrn	591.00
Q. By Student:	0.00
R. Repayment:	0.00

[Calculate](#)

Calculate Return Amounts page

School Return of Funds Displays the amount to be returned by the school by aid fund and amount.

O. By School Displays total amount from the School Return of Funds group box.

P. School Rtrn(school return) Displays total loans to be returned by school from the School Return of Funds group box.

Q. By Student Displays initial grant amount student must return.

R. Repayment Displays loan amount student must repay.

Calculate Click to recalculate the totals if you updated or modified the values.

Reviewing Loan Debts for Withdrawn Students

Access the Return of Loan Funds page (click the Detail link for the R. Std Loan Repaymnt Amount field on the Return of Funds Worksheet).

Return of Loan Funds	
Student Return of Funds	
1. Unsub:	<input type="text" value="0.00"/>
2. Sub:	<input type="text" value="0.00"/>
3. Perkins:	<input type="text" value="0.00"/>
4. Grad PLUS:	<input type="text" value="0.00"/>
5. PLUS:	<input type="text" value="0.00"/>

Return of Loan Funds page

Enter the totals for any Unsubsidized FFEL or Direct Loan, Subsidized FFEL or Direct Loan, Perkins, Graduate PLUS, or PLUS loans for which the student is responsible.

This worksheet is useful when counseling a withdrawn student on loan indebtedness.

Tracking Student and School Return Information

This section discusses how to:

- Track return information.
- Track post-withdrawal disbursement.
- View allocation of post-withdrawal disbursements.
- Review post-withdrawal disbursements.
- Enter return of TIV aid notes.

Pages Used to Track Student and School Return Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student/School Return	STDNT_RTRN_TIV_WK2N	Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Student/School Return	Track return information for the student and school.
Post-Withdrawal Disbursement	STDNT_RTRN_TIV_WK3A	Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Post-Withdrawal Disbursement	Track post-withdrawal disbursements a student was entitled to at the time of withdrawal.
Allocation of PWD	STDNT_PWD_SEC1AN	Click the Part IV Allocation of PWD link on the Post-Withdrawal page.	Enter post-withdrawal disbursement amounts for grants and loans.

Page Name	Definition Name	Navigation	Usage
Post-Withdrawal Disbursements (detail)	STDNT_PWD_SEC1	Click the PWD Detail link on the Post-Withdrawal page.	Review post-withdrawal disbursements. Includes the amount of eligible aid not yet disbursed, eligible aid to be disbursed late, and remaining eligible aid to be disbursed.
Return TIV Aid Notes	STDNT_RTRN_TIV_WK4	Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Return TIV Aid Notes	Enter return of Title IV aid notes. Document information regarding the processing of Title IV Return of Funds.

Tracking Return Information

Access the Student/School Return page (Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Student/School Return).

Return TIV Aid		Return of Funds Worksheet		Student/School Return		D	
Logan Safe				ID:		FAIV0046	
Institution:		PSUNV PeopleSoft University		Aid Year:		2009	
Term:		0605 2008 Summer		Program Type:		Credit Hour Program	
Calculate		Date of Withdrawal:		07/01/2008		Institutional Determination Dt: 07/11/2008	
Student Return of Funds							
Student Notified <input type="checkbox"/>							
Student Return Status:				Notification Date:		<input type="text"/> 31 Q. Amt Due From Student: <input type="text"/> 0.00	
Student Response Information							
Response Date:		<input type="text"/> 31		Repayment Arrangement:		<input type="text"/>	
School Return of Funds							
School Return Status:		Complete		Funds Return Date:		<input type="text"/> 07/17/2008 31 O. Amt Due From School: <input type="text"/> 3049.21	

Student/School Return page

Student Return of Funds

Student Notified

Select this check box to indicate the student has been notified of their Title IV overpayment obligation.

Student Return Status	<p>Displays the student's return of Title IV funds status.</p> <p><i>Pending:</i> Indicates that the calculation and the return of Title IV funds are still in progress. The default status is <i>Pending</i> until you manually change the status to <i>Complete</i>.</p> <p><i>Complete:</i> Indicates that calculation, student notification, and the return of Title IV funds has occurred.</p> <hr/> <p>Note. You should update the Student Return Status field to <i>Complete</i> when a student does not need to return funds.</p> <hr/>
------------------------------	--

Notification Date	Displays the date the student was notified of Title IV overpayment.
Q. Amt Due From Student (Q. amount due from student)	Displays the amount of Title IV funds the student must return. If a student owes a return, the system populates this value from the Return of Funds Worksheet page.

Student Response Information

Response Date	Displays the date the student responded to the notification from the institution about Title IV overpayment.
Repayment Arrangement	<p>Select from available values to indicate the student's action taken in response to repayment arrangements. Values include:</p> <p><i>Arrangement not Complied</i></p> <p><i>Make Arrangements DOE</i></p> <p><i>Make Arrangements School</i></p> <p><i>No Satisfactory Arrangements</i></p> <p><i>Pay School in Full</i></p> <p><i>Title IV Loans Only</i></p>

School Return of Funds

School Return Status	Indicates the institution's repayment status as pending or complete. The default status is pending until you manually change the status to complete.
Funds Return Date	Indicates the date the funds were returned.
O. Amt Due From School	Indicates the amount of Title IV funds the institution must return. If the school owes a return, the system automatically populates this value from the Return of Funds Worksheet page.
Calculate	Click to recalculate the amount the school and student have to return if you made a change to the percentage on the Return of Funds Worksheet page.

Tracking Post-Withdrawal Disbursement

Access the Post-Withdrawal Disbursement page (Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Post-Withdrawal Disbursement).

Student/School Return		Post-Withdrawal Disbursement		Return TIV Aid Notes	
Issa Knobb		ID: FAIV0049			
Institution: PSUNV PeopleSoft University		Aid Year: 2009			
Term: 0605 2008 Summer		Program Type: Credit Hour Program			
<input type="button" value="Calculate"/>		Date of Withdrawal: 07/01/2008		Institutional Determination Dt: 07/09/2008	
		Post-Withdrawal Disb Status: Complete		Date Form Completed: 10/17/2008	
Part I, II, III					
J. TIV Aid to Disburse (Box 1):		1590.81		Total PWD Credited (Box 2): 50.00	
Part IV Allocation of PWD		1590.81		- 50.00 = 1540.81	
PWD Detail		Box 1		Box 2 Box 3	
Part V, VI					
PWD Notification Sent:		07/11/2008		<input type="checkbox"/>	
Response Deadline:		08/11/2008		<input type="checkbox"/>	
Date Response Received:		07/25/2008		<input type="checkbox"/> Response Received <input type="checkbox"/> Not Received	
				<input type="checkbox"/> Late Response Not Accepted	
Date Direct Disb Mailed:		Grant: 07/28/2008		Loan: 07/28/2008	

Post-Withdrawal Disbursement page

Calculate

Click to recalculate the amount of aid to a post-withdrawal student if you made a change to the percentage.

Post-Withdrawal Disb Status (post-withdrawal disbursement status)

Indicates whether or not post-withdrawal disbursement calculations are complete or pending.

The *Pending* status is set when the worksheet is created. Select *Complete* when appropriate for the current stage of processing.

Part I, II, III

J. TIV Aid to Disburse (Box 1)

Displays the total amount of post-withdrawal disbursement due. This field is from Step J. Post Withdrawal Disbursement on the Return of Funds Worksheet page.

Part IV Allocation of PWD

Click this link to access the Allocation of PWD page.

Total PWD Credited (Box 2)	Enter the total outstanding charges scheduled to be paid from PWD.
Box 3	The amount to offer directly to the student is derived from the TIV Aid to Disburse amount less the Total PWD Credited amount. Box 3 = Box 1 - Box 2.

Part V, VI

PWD Notification Sent	Select the date that the post-withdrawal disbursement loan notification was sent to the student or parent.
Response Deadline	Select the date by which the student, parent, or both must respond.
Date Response Received	Select the date that the response was received from the student or parent.
Response Received	Select this check box if the response was received from the student or parent.
Not Received	Select this check box if the response was not received from the student or parent.
Late Response Not Accepted	Select this check box if the response was received from the student or parent after the date in the Response Deadline field.
Date Direct Disb Mailed (date direct disbursement mailed)	Select the date for grant, loan, or both that the direct disbursement was mailed or transferred.

Viewing Allocation of Post-Withdrawal Disbursements

Access the Allocation of PWD page (click the Part IV Allocation of PWD link on the Post-Withdrawal page.)

Allocation of PWD						
Type of Aid	Ln Amt Sought	Ln Amt Auth	Aid Credited	Aid Offered	Aid Accepted	Aid Disbursed
Pell Grant:			50.00			50.00
ACG:			0.00			0.00
SMART:			0.00			400.00
FSEOG:			0.00			0.00
TEACH:			0.00			1090.81
Unsub:	0.00	0.00	0.00	0.00	0.00	0.00
Sub:	0.00	0.00	0.00	0.00	0.00	0.00
Perkins:	0.00	0.00	0.00	0.00	0.00	0.00
Grad Plus:	0.00	0.00	0.00	0.00	0.00	0.00
Plus:	0.00	0.00	0.00	0.00	0.00	0.00
Totals:	0.00	0.00	50.00	0.00	0.00	1540.81
	<input type="button" value="Calculate"/>					

Allocation of PWD page

Enter appropriate amounts for each column and type of aid:

Ln Amt Sought (loan amount sought) Enter the loan amount school seeks to credit to the account.

Ln Amt Auth (loan amount authorized) Enter the loan amount authorized to credit to the account

Aid Credited Enter the aid credited to the account.

Aid Offered Enter an amount of aid offered as direct disbursement.

Aid Accepted Enter an amount of aid accepted as direct disbursement.

Aid Disbursed Enter amount of aid disbursed directly to the student

Calculate Click this button to total the columns.

Reviewing Post-Withdrawal Disbursements

Access the Post-Withdrawal Disbursements detail page (click the PWD Detail link on the Post-Withdrawal Disbursements page).

Post-Withdrawal Disbursements				
Eligible Aid Not Disbursed		Aid To Be Late Disbursed		Remaining To Be Disbursed
				1590.81
Pell Grant:	100.00	Pell Grant:	100.00	1490.81
Acad Comp:	0.00	Acad Comp:	0.00	1490.81
SMART:	400.00	SMART:	400.00	1090.81
FSEOG:	0.00	FSEOG:	0.00	1090.81
TEACH:	2500.00	TEACH:	1090.81	0.00
Unsub:	0.00	Unsub:	0.00	0.00
Sub:	591.00	Sub:	0.00	0.00
Perkins:	0.00	Perkins:	0.00	0.00
Grad Plus:	0.00	Grad Plus:	0.00	0.00
PLUS:	0.00	PLUS:	0.00	0.00
Remaining:				0.00

Post-Withdrawal Disbursements detail page

Eligible Aid Not Disbursed

Displays aid not disbursed at time of withdrawal.

Aid To Be Late Disbursed

Displays aid amounts eligible for a post-withdrawal late disbursement.

Remaining To Be Disbursed

Displays aid amounts eligible for a post-withdrawal late disbursement.

Entering Return TIV Aid Notes

Access the Return TIV Aid Notes page (Financial Aid, Return of Title IV Funds HERA, Create Worksheet, Return TIV Aid Notes).

Student/School Return		Post-Withdrawal Disbursement		Return TIV Aid Notes	
Logan Safe			ID: FAIV0046		
Institution: PSUNV PeopleSoft University			Aid Year: 2009		
Term: 0605 2008 Summer			Program Type: Credit Hour Program		
Date of Withdrawal: 07/01/2008			Institutional Determination Dt: 07/11/2008		
<div> <div>Find View All</div> <div>First 1 of 1 Last</div> </div> <div> Withdrawal due based on students last attendance at an academic related event. </div> <div> <div>User ID: PS</div> <div>Last Update Timestamp: 10/17/2008 10:14AM</div> </div>					

Return TIV Aid Notes page

Enter comments of any length into the text area.

Tracking Return of Title IV Funds

This section discusses how to:

- Track student return of Title IV funds.
- Track school return of Title IV funds.
- Review post-withdrawal disbursement tracking data.

Pages Used to Track Return of TIV Funds

Page Name	Definition Name	Navigation	Usage
Track Student Returns	SFA_TIV_RTN_TRACK	Financial Aid, Return of Title IV Funds HERA, Track TIV Funds Return, Track Student Returns	Track student return of Title IV funds. View the status of funds for all students where a calculation exists.
Return of Funds Detail	STDNT_RTOF_SEC1NA	Click the Detail link from the Track Student Returns Summary 2 page or Track School Returns Summary page.	View student aid amount and the return of funds for both the student and school.

Page Name	Definition Name	Navigation	Usage
Track School Returns	SFA_TIV_RTN_TRACK2	Financial Aid, Return of Title IV Funds HERA, Track TIV Funds Return, Track School Returns	Track school return of TIV funds. View the status of funds for your institution.
Post Withdrawal Disb Tracking	SFA_TIV_PWD_TRACK	Financial Aid, Return of Title IV Funds HERA, Track PW Disbursement, Post Withdrawal Disb Tracking	Review post-withdrawal disbursement tracking data.

Tracking Student Return of Title IV Funds

Access the Track Student Returns page (Financial Aid, Return of Title IV Funds HERA, Track TIV Funds Return, Track Student Returns).

Track Student Returns

Track School Returns

Institution:

PSUNV

PeopleSoft University

Aid Year:

2009

Term:

0605

2008 Summer

Program Type:

Credit Hour Program

View:

☐ All
☐ Complete
☒ Pending

Status

Summary 1

Summary 2

Last Updated

Customize

Find

View All

First

1 of 1

Last

ID	Name	Return Status
1 FAIV0047	Locke,Kerry B	Pending

^a Dept of ED must be notified within 45 days of a student's overpayment if the student has neither repaid nor made satisfactory arrangements to repay.

Track Student Returns page: Status tab

View

Select one of the following:

All: View students with a status of pending or completed.

Complete: View students who have completed the Return of Title IV Funds process.

Pending: View students who are being processed.

Status Tab

- ID** Indicates a unique identification code for a student associated with your institution.
- Name** Displays the name of a student.
- Return Status** Displays the student's return of Title IV funds status. This status comes from the Student/School Return page. If a student does not have a return, the student does not appear in the list.
- Pending:* The calculation and the return of Title IV funds are still in progress. This status comes from the Student/School Return page; you can change it manually on this page.
- Complete:* The calculation, student notification, and the return of Title IV funds has occurred.

Summary 1 Tab

Select the Summary 1 tab.

Track Student Returns
Track School Returns

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program
View: ☐ All ☐ Complete ☒ Pending

Customize | Find | View All | First 1 of 1 Last

Status	Summary 1	Summary 2	Last Updated
Institutional Determination Dt	Days Elapsed *	Student Notified	Notification Date
1 07/15/2008	94		07/16/2008

* Dept of ED must be notified within 45 days of a student's overpayment if the student has neither repaid nor made satisfactory arrangements to repay.

Track Student Returns page: Summary 1 tab

- Institutional Determination Dt** (institutional determination date) Displays the withdrawal date determined by the financial aid office.

Days Elapsed	After an institution determines the date of withdrawal, the system calculates and displays the number of days passed since the student withdrew. The days are calculated using the Institutional Determination Dt field as the starting date.
Student Notified	If selected, indicates the student has been notified of their Title IV overpayment obligation.
Notification Date	Displays the date the student was notified of Title IV overpayment.

Summary 2 Tab

Select the Summary 2 tab.

Track Student Returns
Track School Returns

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program
View: ☐ All ☐ Complete ☒ Pending

Customize | Find | View All | 1 of 1 | First | Last

Status	Summary 1	Summary 2	Last Updated
Response Date	Repayment Arrangement	Q. Amt Due From Student	Detail
1 08/07/2008	Make Arrangements School	1599.90	Detail

^a Dept of ED must be notified within 45 days of a student's overpayment if the student has neither repaid nor made satisfactory arrangements to repay.

Track Student Returns page: Summary 2 tab

Response Date	Displays the date the student responded to the notification from the institution about Title IV overpayment.
Repayment Arrangement	<p>Displays one of the student response options from the Student/School Return page. The values are:</p> <p><i>Arrangement not Complied</i></p> <p><i>Make Arrangements DOE</i></p> <p><i>Make Arrangements School</i></p> <p><i>No Satisfactory Arrangements</i></p> <p><i>Pay School in Full</i></p> <p><i>Title IV Loans Only</i></p>

Q. Amt Due From Student(Q. amount due from student) Displays the amount of funds needed to be returned by the student.

Detail Click to view the Return of Funds Detail page.

Last Updated Tab

Select the Last Updated tab.

Track Student ReturnsTrack School Returns

Institution:

PSUNV

PeopleSoft University

Aid Year:

2009

Term:

0605

2008 Summer

Program Type:

Credit Hour Program

View:

☐ All

☐ Complete

☒ Pending

Status

Summary 1

Summary 2

Last Updated

Customize

Find

View All

First

1 of 1

Last

User ID	Last Update Timestamp
1 PS	10/17/2008 10:27AM

^ Dept of ED must be notified within 45 days of a student's overpayment if the student has neither repaid nor made satisfactory arrangements to repay.

Track Student Returns page: Last Updated tab

Tracking School Return of Title IV Funds

Access the Track School Returns page (Financial Aid, Return of Title IV Funds HERA, Track TIV Funds Return, Track School Returns).

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Track Student Returns		Track School Returns	
Academic Institution:	PSUNV PeopleSoft University	Aid Year:	2009
Term:	0605 2008 Summer	Program Type:	Credit Hour Program
View:	<input checked="" type="radio"/> All <input type="radio"/> Complete <input type="radio"/> Pending		
<div>Customize Find View All First 1-2 of 2 Last</div>			
Status	Summary	Last Updated	
ID	Name	Return Status	
1 FAIV0046	Safe, Logan A	Pending	
2 FAIV0047	Locke, Kerry B	Complete	

^{*} The institution must return its share of unearned Title IV funds within 30 days.

Track School Returns page: Status tab

View

Select one of the following:

All: View students with a status of pending or completed.

Complete: View students who have completed the Return of Title IV Funds process.

Pending: View students who are being processed.

Status Tab

Return Status

Displays the school's return of Title IV funds status.

Pending: Indicates that the calculation and the return of Title IV funds are still in progress. This status comes from the Student/School Return page; you can change it manually on this page.

Complete: Indicates that calculation and the school return of Title IV funds has occurred.

Summary Tab

Select the Summary tab.

Track Student Returns		Track School Returns																						
Academic Institution:	PSUNV PeopleSoft University	Aid Year:	2009																					
Term:	0605 2008 Summer	Program Type:	Credit Hour Program																					
View:	<input checked="" type="radio"/> All <input type="radio"/> Complete <input type="radio"/> Pending																							
Customize Find View All First 1-2 of 2 Last																								
<table border="1"> <thead> <tr> <th>Status</th> <th>Summary</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td></td> <td> <table border="1"> <thead> <tr> <th>Institutional Determination Dt</th> <th>Days Elapsed ^</th> <th>Funds Return Date</th> <th>O. Amt Due From School</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>1 07/11/2008</td> <td>102</td> <td>07/17/2008 </td> <td>3049.21</td> <td>Detail</td> </tr> <tr> <td>2 07/15/2008</td> <td>94</td> <td>07/24/2008 </td> <td>544.00</td> <td>Detail</td> </tr> </tbody> </table> </td> <td></td> </tr> </tbody> </table>				Status	Summary	Last Updated		<table border="1"> <thead> <tr> <th>Institutional Determination Dt</th> <th>Days Elapsed ^</th> <th>Funds Return Date</th> <th>O. Amt Due From School</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>1 07/11/2008</td> <td>102</td> <td>07/17/2008 </td> <td>3049.21</td> <td>Detail</td> </tr> <tr> <td>2 07/15/2008</td> <td>94</td> <td>07/24/2008 </td> <td>544.00</td> <td>Detail</td> </tr> </tbody> </table>	Institutional Determination Dt	Days Elapsed ^	Funds Return Date	O. Amt Due From School	Detail	1 07/11/2008	102	07/17/2008	3049.21	Detail	2 07/15/2008	94	07/24/2008	544.00	Detail	
Status	Summary	Last Updated																						
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Institutional Determination Dt	Days Elapsed ^	Funds Return Date	O. Amt Due From School	Detail																				
1 07/11/2008	102	07/17/2008	3049.21	Detail																				
2 07/15/2008	94	07/24/2008	544.00	Detail																				
^ The institution must return its share of unearned Title IV funds within 30 days.																								

Track School Returns page: Summary tab

Institutional Determination Dt
(institutional determination date)

Displays the withdrawal date determined by the institution.

Funds Return Date

Displays the date the user updated the Funds Return Date field on the Student/School Return page.

O. Amt Due From School(O. amount due from school)

Displays the amount of aid the institution must return to the Title IV program.

Detail

Click to view the Return of Funds Detail page.

Last Updated Tab

Select the Last Updated tab.

Track Student Returns		Track School Returns	
Academic Institution:	PSUNV PeopleSoft University	Aid Year:	2009
Term:	0605 2008 Summer	Program Type:	Credit Hour Program
View:	<input checked="" type="radio"/> All <input type="radio"/> Complete <input type="radio"/> Pending		
<div> Customize Find View All </div> <div> First 1-2 of 2 Last </div>			
Status	Summary	Last Updated	
User ID	Last Update Timestamp		
1 PS	10/21/2008 5:41PM		
2 PS	10/21/2008 5:41PM		

^a The institution must return its share of unearned Title IV funds within 30 days.

Track School Returns page: Last Updated tab

Reviewing Post-Withdrawal Disbursement Tracking Data

Access the Post Withdrawal Disb Tracking page (Financial Aid, Return of Title IV Funds HERA, Track PW Disbursement, Post Withdrawal Disb Tracking).

Post Withdrawal Disb Tracking			
Institution:	PSUNV PeopleSoft University	Aid Year:	2009
Term:	0605 2008 Summer	Program Type:	Credit Hour Program
View:	<input checked="" type="radio"/> All <input type="radio"/> Complete <input type="radio"/> Pending		
<div> Customize Find View All </div> <div> First 1 of 1 Last </div>			
Status	Summary	Dates	Service Impact
ID	Name	Status	
1 FAIV0049	Knobb,Issa D	Complete	

^a Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.

Post Withdrawal Disb Tracking page: Status tab

Note. The Calculate link is not available when you access the Post-Withdrawal Disbursements page from the Post Withdrawal Disb Tracking page.

View

Select one of the following:

All: View students with a status of *Pending* or *Completed*.

Complete: View students who have completed the Return of Title IV Funds process.

Pending: View students who are being processed.

Status Tab**Status**

Displays the student's post-withdrawal disbursement status. The system displays a status of *Pending* to indicate that the calculation and the post-withdrawal disbursement are still in progress. A status of *Complete* indicates that calculation, student notification, and the post-withdrawal disbursement has occurred. The status is from the Post-Withdrawal Disbursement page.

Summary Tab

Select the Summary tab.

Post Withdrawal Disb Tracking			
Institution:	PSUNV	PeopleSoft University	Aid Year: 2009
Term:	0605	2008 Summer	Program Type: Credit Hour Program
View:	<input checked="" type="radio"/> All <input type="radio"/> Complete <input type="radio"/> Pending		
Customize Find View All First 1 of 1 Last			
Status	Summary	Dates	Service Impact Last Updated
Institutional Determination Dt		Days Elapsed *	Disbursement Amount Detail
1 07/09/2008		0	1590.81 Detail
* Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.			

Post Withdrawal Disb Tracking page: Summary tab

Disbursement Amount

Displays the amount of funds the institution can offer the student as a post-withdrawal disbursement.

Detail

Click to view the Post-Withdrawal Disbursements page.

Dates Tab

Select the Dates tab.

Post Withdrawal Disb Tracking

Institution:

PSUNV

PeopleSoft University

Aid Year:

2009

Term:

0605

2008 Summer

Program Type:

Credit Hour Program

View:

☒ All

☐ Complete

☐ Pending

Customize | Find | View All |

First 1 of 1 Last

Status	Summary	Dates	Service Impact	Last Updated
	PWD Notification Sent	Response Deadline		
1	07/11/2008	08/11/2008		

* Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.

Post Withdrawal Disb Tracking page: Dates tab

- PWD Notification Sent

View or edit the date that the post-withdrawal disbursement loan notification was sent to the student, parent, or both.
- Response Deadline

View or edit the date by which the student, parent, or both must respond.

Service Impact Tab

Select the Service Impact tab.

Post Withdrawal Disb Tracking

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program

View: ☒ All ☐ Complete ☐ Pending

Customize Find View All			
First 1 of 1 Last			
Status	Summary	Dates	Service Impact
	<u>Date Response Received</u>	<u>Date Direct Disb Mailed-Grant</u>	<u>Date Direct Disb Mailed-Loan</u>
1	07/25/2008	07/28/2008	07/28/2008

^a Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.

Post Withdrawal Disb Tracking page: Service Impact tab

Date Response Received View or edit the date that the school received the response from the student.

Date Direct Disb Mailed-Grant (date direct disbursement mailed for a grant)	View or edit the date that the direct disbursement was mailed or transferred.

Date Direct Disb	View or edit the date that the direct disbursement was mailed or transferred.
Mailed-Loan (date direct disbursement mailed for a loan)	

Last Updated Tab

Select the Last Updated tab.

Post Withdrawal Disb Tracking

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program

View: ☒ All ☐ Complete ☐ Pending

Status	Summary	Dates	Service Impact	Last Updated
<u>User ID</u>				<u>Last Update Timestamp</u>
1 PS				10/21/2008 5:47PM

* Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.

Post Withdrawal Disb Tracking: Last Updated tab

Reviewing Return of Title IV Funds Student Summary

This section discusses how to review the summary student return of TIV funds.

Page Used to Review Return of TIV Funds Student Summary

Page Name	Definition Name	Navigation	Usage
Return of TIV Funds Summary	RTRN_TIV_STU_TRACK	Financial Aid, Return of Title IV Funds HERA, Review Summary of TIV Return	View summary of the student's return of TIV funds calculation.

Reviewing the Summary of Student Return of TIV Funds

Access the Return of TIV Funds Summary page (Financial Aid, Return of Title IV Funds HERA, Review Summary of TIV Return).

Return of TIV Funds Summary

Institution: PSUNV PeopleSoft University **Aid Year:** 2009

Term: 0605 2008 Summer **Program Type:** Credit Hour Program

View: ☐ All ☐ Complete ☒ Pending

Customize Find View All First 1-3 of 3 Last				
Status		Summary	Calculation Period	Worksheet Data
ID	Name	Status	Go To Worksheets	
1 FAIV0046	Safe, Logan A	Pending	Go To Worksheets	
2 FAIV0047	Locke, Kerry B	Pending	Go To Worksheets	
3 FAIV0049	Knobb, Issa D	Pending	Go To Worksheets	

Return of TIV Funds Summary page: Status tab

View

Select one of the following:

All: View students with a status of *Pending* or *Complete*.

Complete: View students who have completed the Return of Title IV Funds process.

Pending: View students who are being processed.

Status Tab

Status

Indicates the student's overall status of the Return of Title IV calculation.

Pending: The calculation and the return of Title IV funds are still in progress.

Complete: The calculation, student notification, and the return of Title IV funds has occurred.

Go To Worksheets

Click to access the Return TIV Aid page.

Summary Tab

Select the Summary tab.

Return of TIV Funds Summary

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program

View: ☐ All ☐ Complete ☒ Pending

Status	Summary	Calculation Period	Worksheet Data
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Customize | Find | View All | First 1-3 of 3 Last

	Undetermined Withdrawal Date	Withdrawal \ Cancel Date	Inst Determination Date	Days Elapsed
1	<input type="checkbox"/>	07/01/2008	07/11/2008	98
2	<input type="checkbox"/>	07/02/2008	07/15/2008	94
3	<input type="checkbox"/>	07/01/2008	07/09/2008	100

Return of TIV Funds Summary page: Summary tab

Undetermined Withdrawal Date

If the student withdrew unofficially, the system displays this check box as selected. This information comes from the Return TIV Aid page. The system displays a date to indicate the midpoint of the payment period if the student unofficially withdraws. You can update this field if you want to use a different withdrawal date. For example, you can use the date the student last attended an academic-related event if this date was verified by your institution.

Withdrawal/Cancel Date Displays the last date of recorded attendance, the date the student began the withdrawal process, the date the student provided to your school with the intent to withdraw, or the midpoint of the payment period if the student unofficially withdraws. The system displays the default date based on the date that was established in Student Records.

Calculation Period Tab

Select the Calculation Period tab.

Return of TIV Funds Summary

Institution: PSUNV PeopleSoft University **Aid Year:** 2009
Term: 0605 2008 Summer **Program Type:** Credit Hour Program

View: ☐ All ☐ Complete ☒ Pending

Status	Summary	Calculation Period	Worksheet Data
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Customize | Find | View All | First 1-3 of 3 Last

	Period Used for Calculation	Period Start Date	Period End Date	Date Form Completed	J. TIV Aid to Disburse	Status
1	Enrollment	05/23/2008	08/14/2008			
2	Enrollment	05/23/2008	08/14/2008			
3	Enrollment	05/23/2008	08/14/2008	10/17/2008	1590.81	Complete

Return of TIV Funds Summary page: Calculation Period tab

Period Used for Calculation	Displays the time period the system uses to define the start and end date of the payment period or enrollment period.
Period Start Date	Displays the first day of the term or payment period. The system uses the payment period or enrollment period start date from the Return of TIV Aid page.
Period End Date	Displays the last day of the term or payment period. The system uses the payment period or enrollment period end date from the Return of TIV Aid page.
Date Form Completed	Displays the date when you calculated the student's withdrawal percentage and changed the overall status to <i>Complete</i> from the Return of TIV Aid page.
J. TIV Aid to Disburse	Displays the amount of aid the student may be eligible for as a post-withdrawal disbursement. If the student received less than his or her eligibility, the system displays the amount to be disbursed.
Status	Displays the status of the post-withdrawal disbursement calculation for Title IV aid to be disbursed as <i>Pending</i> or <i>Complete</i> .

Worksheet Data Tab

Select the Worksheet Data tab.

Return of TIV Funds Summary

Institution: PSUNV PeopleSoft University
 Aid Year: 2009

Term: 0605 2008 Summer
 Program Type: Credit Hour Program

View:
☐ All
 ☐ Complete
 ☒ Pending

Customize | Find | View All |

First 1-3 of 3 Last

Status	Summary	Calculation Period	Worksheet Data
O. Amt Due From School	Status	Q. Amt Due From Student	Status
1	3049.21 Complete		
2	544.00 Complete	1599.90	Pending
3			

Return of TIV Funds Summary page: Worksheet Data tab

O. Amt. Due From School (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV programs. The institution allocates its share of unearned funds first.
Status	Displays the school's return status of the calculation for the amount due from the school as <i>Pending</i> or <i>Complete</i> .
Q. Amt. Due From Student (Q. amount due from student)	Displays the amount of aid the student must return to the Title IV programs.

Status

Displays the student's return status of the calculation for the amount due from the student as *Pending* or *Complete*.

Generating Return of Title IV Funds Withdrawal Report

This section discusses how to:

- Generate the Return of Title IV Funds Report.
- View career totals.

Pages Used to Generate the Return of Title IV Aid Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Return of TIV Funds Report	RUN_CNTL_FATIVRTN	Financial Aid, Return of Title IV Funds HERA, Return of TIV Aid Report, Return of TIV Funds Report	Generate the Return of Title IV Funds Withdrawal report.
Totals for Career	RUN_CNTL_CARTOLS	Click the Totals link on the Return of TIV Funds Report page.	View the total number of days passed for each aging agent category and view the total number of students processed.

Generating Return of TIV Funds Report

Access the Return of TIV Funds Report page (Financial Aid, Return of Title IV Funds HERA, Return of TIV Aid Report, Return of TIV Funds Report).

Return of TIV Funds Report

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Return of TIV Funds Report Parameters

Find | View All First ◀ 1 of 1 ▶ Last

***Institution:** PSUNV
***Aid Year:** 2009
Term:

Active ☒ + -

Report Structured By: By Date ▼

Process Students: New and Pending Withdrawals ▼

Process Selected Careers ☒

Selected Careers Customize | Find | View All |
First ◀ 1 of 1 ▶ Last

Academic Career
Totals

1 Undergrad ▼
Totals
+
-

Total Students Processed:	0	Students 0-10 Days:	0
		Students 11-20 Days:	0
		Students 21-30 Days:	0
		Students Over 30 Days:	0

Process Instance: 0
Run Date and Time:

Refresh

Return of TIV Funds Report page

The report displays the most recent withdrawal dates first and the oldest last. The system displays the information based on how you define your run control options. It includes worksheet calculations, return of funds by the school and student, institutional charges, and number of days since the withdrawal date.

Active Select to activate the run control for that row.

Report Structured By Select from the following options how the report was structured:

By Date

By Name

By Date Range/Name

Process Students Select from the following status options.

Completed Withdrawals: Select to view students who have completed withdrawal worksheets.

New Withdrawals Only: Select to view students who have a withdrawal date but no withdrawal worksheet records.

New and Pending Withdrawals: Select to view students who have a withdrawal date, but the withdrawal process is not complete.

Pending Withdrawals: Select to view students whose Return of Title IV calculations are not complete.

Process Selected Careers	Select to process the report by specific careers. If this check box is clear, the system processes all careers.
Clock Hour Program	Select to view records with a program type by clock hours.
Credit Hour Program	Select to view records with a program type by credit hours.
Students 0-10 Days, Students 11-20 Days, Students 21-30 Days, and Students Over 30 Days	Used as an aging agent to indicate how many days have passed since the institution determined the date of withdrawal.
Total Students Processed	Displays the total number of students processed for this report.
Process Instance	Displays an increment counting of the last time the process was run.
Run Date and Time	Displays the date and time the process was run.
Refresh	Click to refresh the totals after each time you run the process.
Totals	Click to view the total number records based on career.

Viewing Career Totals

Access the Totals for Career page (click the Totals link on the Return of TIV Funds Report page).

Totals For Career			
Total 0-10:	<input type="text"/>	Total 21-30:	<input type="text"/>
Total 11-20:	<input type="text"/>	Total 30+:	<input type="text"/>
		Total Students Processed:	<input type="text"/>

Totals for Career page

Chapter 44

Managing Work-Study

This chapter provides an overview of work-study and discusses how to:

- Manage work-study jobs.
- View the student's work history.

Understanding Work-Study

Managing work-study requires a bridge between the institution's payroll department and the financial aid office to provide an overall view of student employment. Students who are classified as *employees* are identified and accessed in the institution's payroll department to track compensated wages. Wages may come from various forms of employment such as academic, staff, or work-study. When each type of compensation is identified, the information is updated and can be viewed within Financial Aid. This allows the institution to report and monitor student earnings to ensure that total earnings do not exceed the work-study award.

Work-study is an important part of a financial aid package for students. The federal work-study program provides jobs for undergraduate and graduate students with financial need, enabling them to earn money to pay educational expenses. Students receive work-study awards from participating institutions after filing a Free Application for Federal Student Aid (FAFSA) to determine their financial need. Students can be employed by the institution; by a federal, state, or local public agency; by private nonprofit organizations; or by private organizations. The program encourages community service work and work related to the student's course of study.

The minimum requirement to access a work-study placement record is an accepted work-study award. The hiring department then records the student's placement on the Work-Study Placement page. After placement, you can review the placement records of students who are active as employees.

Managing Work-Study Jobs

This section discusses how to:

- Assign a work-study job.
- View job summary information.
- View a student's total award package.
- View earnings summary.
- View general job information, work location, and compensation.

- View salary components.

Pages Used to Manage Work-Study Jobs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Work Study Placement	STDNT_WRKSTUDY_AWD	Financial Aid, Awards, View Work Study Approval, Work Study Placement	Assign a work-study job to an approved student and verify that the student has a posted work-study award.
Job Summary	STDNT_WS_JOB_SEC	Click the Student Job Summary link on the Work Study Placement page.	View the student's job information from PeopleSoft Enterprise Human Resources.
Award Summary	FA_EARNINGS1	Financial Aid, Awards, View Award Earnings Summary, Award Summary	View the student's total award package and the status of each award. This page lists each of the student's awards, providing the financial aid item type, career associated with the award, and the offered, accepted, authorized, and disbursed amounts.
Award Detail	AWARD_DETAIL_SEC	Click the Award Details link on the Award Summary page.	View offered and accepted amounts, net disbursement balance, and authorized and disbursed amounts.
Earnings Summary	FA_EARNINGS2	Financial Aid, Awards, View Award Earnings Summary, Earnings Summary	View a student's campus earnings. Campus earnings information includes hours worked and gross earnings in year-to-date, month-to-date, and quarterly amounts.
Job Information	JOB_SUMMARY	Financial Aid, Awards, View Campus Jobs, Job Information	View job information, work location, and compensation.
Salary Components	COMP_JOB_SUMM_SEC	Click the Components link on the Job Information page.	View compensation rate and frequency and other payment information.

Assigning a Work-Study Job

Access the Work Study Placement page (Financial Aid, Awards, View Work Study Approval, Work Study Placement).

Work Study Placement			
Shane Carr		ID:	FA0866
Aid Year:	2005	Financial Aid Year 2004-2005	Institution: PSUNV
Item Type:	900000000200 Federal Work-Study Program		
Award Status:	Accepted	Offered:	2,000.00 Accepted: 2,000.00 Disbursed: 0.00
Find View All First 1 of 1 Last			
Effective Date:	10/15/2004	Empl Rcd Nbr:	0
Status:	Active	Rcd Effective Date:	01/01/2000
Placement Status:	Placed In Position	Effective Sequence:	0
Placement Date:	10/15/2004	Department:	FINAID OFC
Community Service Indicator:		Job Code:	PS0005 Student Job Summary

Work Study Placement page

Item Type	Displays the item type number and description for the work-study award.
Award Status	Displays acceptance of work-study award by student.
Offered	Displays the amount of work-study earnings offered to the student.
Accepted	Displays the amount of work-study earnings that the student accepted.
Disbursed	Displays the amount of work-study earned by the student.
Placement Status	<p>Select the value that indicates the current status of the student's job placement. Values are:</p> <p><i>Appointment Terminated:</i> The student is no longer in the work-study job.</p> <p><i>Earned Maximum for Award:</i> The student has earned the annual awarded work-study maximum.</p> <p><i>Eligible for Placement:</i> The student is eligible for placement.</p> <p><i>Not Placed in Position:</i> The student is not placed in a work-study position.</p> <p><i>Placed in Position:</i> The student is placed in a work-study position.</p>
Placement Date	Enter the date on which the hiring department enters the placement status.
Community Service Indicator	<p>Indicates whether the student's job fulfills the community service requirement for your institution. Values are:</p> <p><i>Community Service:</i> Fulfills a community service requirement.</p> <p><i>Not Community Service:</i> Does not satisfy the community service requirement.</p>

Note. The following fields become available when the student's placement status is *Eligible for Placement*, *Placed in Position*, or *Appointment Terminated*.

Empl Rcd Nbr (employment record number)	Select the employment record number that corresponds to the assigned job.
Rcd Effective Date (record effective date)	Enter the date when the student's employment record was initialized.
Effective Sequence	Enter the sequence number for the particular employment record number.
Department	Displays the department of the student's job. This value comes from the employment record.
Job Code	Displays the job code for the student's job. This value comes from the employment record.
Student Job Summary	Click to access the Job Summary page and view the student's job information.

Viewing Job Summary Information

Access the Job Summary page (Click the Student Job Summary link on the Work Study Placement page).

Job Summary			
Action:	HIR		
Action Date:	08/16/2004	Reason:	
Payroll Status:	Active		
Company:	Financial Aid - Work Study		
Job Entry Date:	01/01/2000		
Regular/Temporary:	Regular	Comp Rate:	270.000000
Full/Part Time:	Part-Time	Comp Freq:	Biweekly
Standard Hours:	20.00	Hourly Rate:	6.750000
Step:			
Step Entry Date:			

Job Summary page

Viewing a Student's Total Award Package

Access the Award Summary page (Financial Aid, Awards, View Award Earnings Summary, Award Summary).

Award Summary		Earnings Summary			
Shane Carr		ID:	FA0866		
Aid Year:	2005	Financial Aid Year 2004-2005	Institution: PSUNV		
Offered/Accepted		Authorized/Disbursed			
	Item Type	Description	Academic Career	Offered	Accepted
1	9000000000100	Federal Pell Grant	UGRD	3950.00	3950.00
2	9000000000200	Federal Work-Study Program	UGRD	2000.00	2000.00

Award Summary page: Offered/Accepted tab

Authorized/Disbursed Tab

Select the Authorized/Disbursed tab.

Award Summary		Earnings Summary	
Shane Carr		ID:	FA0866
Aid Year:	2005	Financial Aid Year 2004-2005	Institution: PSUNV
Offered/Accepted		Authorized/Disbursed	
Item Type	Description	Authorized	Disbursed
1 900000000100	Federal Pell Grant		Award Detail
2 900000000200	Federal Work-Study Program		Award Detail

Award Summary page: Authorized/Disbursed tab

Award Detail Click to access the Award Detail page.

Viewing Earnings Summary

Access the Earnings Summary page (Financial Aid, Awards, View Award Earnings Summary, Earnings Summary).

Award Summary

Earnings Summary

Shane Carr

ID: FA0866

Aid Year: 2005

Financial Aid Year 2004-2005

Institution: PSUNV

Period Information

Find | View All

First 1 of 1 Last

Company: PSF

Financial Aid - Work Study

Balance ID: CY

Current Year Balances

Balances for Year: 2004

Empl Rcd Nbr: 0

Earnings Balances

Find | View All

First 1 of 1 Last

Quarter: Quarter 3

Period: August

Earnings Type: PSW

Work Study Earnings

Hours YTD: 60.00

Gross Earnings YTD: \$405.00

Hours QTD: 60.00

Gross Earnings QTD: \$405.00

Hours MTD: 60.00

Gross Earnings MTD: \$405.00

Earnings Summary page

Viewing General Job Information, Work Location, and Compensation

Access the Job Information page (Financial Aid, Awards, View Campus Jobs, Job Information).

Renee Stowitzky

EMP

ID: FA0860

Empl Rcd #: 0

Job Information

Customize | Find | View All

First 1 of 1 Last

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Short Description	Action Reason
01/01/2000	0	Hire	

Job Information page: General tab

Job Information Tab

Select the Job Information tab.

Renee Stowitzky

EMP




ID:

FA0860

Empl Rcd #:

0

Job Information

[Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
01/01/2000	0	PS0005	Hourly	Active	Part-Time	Regular	20.00	Weekly

Job Information page: Job Information tab

Work Location Tab

Select the Work Location tab.


Renee Stowitzky

EMP

ID: FA0860

Empl Rcd #: 0

Job Information

Customize | Find | View All | 

First 1 of 1 Last

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
01/01/2000	0		PSF	Fin Aid			PSF	Biweekly

Job Information page: Work Location tab

Compensation Tab

Select the Compensation tab.

Renee Stowitzky

EMP

ID:

FA0860

Empl Rcd #:

0

Job Information

Customize | Find | View All |

First

1 of 1

Last

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
01/01/2000	0	7,280.00	606.67	28.00	7.00	USD	0.000	Components

Job Information page: Compensation tab


Components Click to access the Salary Components page.

Viewing Salary Components

Access the Salary Components page (click the Components link on the Job Information page).

Salary Components


Renee Stowitzky **ID:** FA0860 **Empl Rcd#:** 0

Compensation Rate: 280.00  **USD**

Compensation Frequency: B Biweekly

Pay Components

Amounts Controls Changes Conversion

	Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	NAHRLY	0	7.00 	USD	Hourly			


Salary Components page: Amounts tab

Controls Tab

Select the Controls tab.

Salary Components

Renee Stowitzky **ID:** FA0860 **Empl Rcd#:** 0

Compensation Rate: 280.00  **USD**

Compensation Frequency: B Biweekly

Pay Components



Amounts **Controls** Changes Conversion

	Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details
1	NAHRLY	0	Manual	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Details

Salary Components page: Controls tab

Changes Tab


Select the Changes tab.

Salary Components							
Renee Stowitzky				ID:	FA0860	Empl Rcd#:	0
Compensation Rate:		280.00 		USD			
Compensation Frequency:		B		Biweekly			
Pay Components							
Amounts		Controls		Changes		Conversion	
	Rate Code	Seq	Change Amount			Change Points	Change Percent
1	NAHRLY	0	 USD	Hourly			

Salary Components page: Changes tab

Conversion Tab

Select the Conversion tab.

Salary Components							
Renee Stowitzky				ID:	FA0860	Empl Rcd#:	0
Compensation Rate:		280.00 		USD			
Compensation Frequency:		B		Biweekly			
Pay Components							
Amounts		Controls		Changes		Conversion	
	Rate Code	Seq	Converted Comp Rate				Apply FTE
1	NAHRLY	0	280.000000				<input type="checkbox"/>

Salary Components page: Conversion tab

Viewing the Student's Work History

For information about viewing a student's work history, refer to your Human Resources documentation.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Viewing Summary Workforce Information," Viewing Worker Job History

Chapter 45

Using the Fiscal Operations Report and Application to Participate

This chapter provides an overview of the Fiscal Operations Report and Application to Participate (FISAP) and discusses how to produce the FISAP report for 9.0.

Understanding the FISAP Report

Using the FISAP process, you report expenses for Federal Campus-Based programs—the Federal Supplemental Education Opportunity Grant (FSEOG), Federal Work-Study, and Federal Perkins Loan programs. The Department of Education uses the distribution of expenditures to evaluate whether institutions are appropriating their federal allocation of Campus-Based funds to applicants with the most need. The reported spending levels affect subsequent year allocations. The programs enable you to transfer certain percentages of funds back to last year or forward to the next year to best use unexpended funds.

For your school to transmit, receive, and report FISAP data, you must submit your FISAP expenditures to the Department of Education through their FISAP website at <http://www.cbfisap.sfa.ed.gov/>. Your personal identification number (PIN) allows you access to information in various department systems. If you do not have a PIN, go to www.pin.ed.gov to apply. You must also have a TG number. The system uses the TG number to identify your school and your access rights to the eCampus-Based system. If you do not have a TG number, go to www.fsawebenroll.ed.gov.

Use the provided structured query report (SQR) to print and to enter the calculated values into the Department of Education FISAP for Windows or FISAP on the web. For audit purposes, the Department of Education requires that you keep data logs and backups of your final FISAP reports and any records necessary to support their data (for example, the source data for the income grid) for three years from the end of the award year for which you submitted the FISAP.

The following FISAP report information is generated:

- Part II, Section E. Assessment and Expenditures: Total Federal Pell Expenditures, Academic Competitiveness Grant (ACG) and National SMART Grant expenditures, and Total Expended for State Grants and Scholarships Made to Undergraduates.
- Part II, Section F. Information on Eligible Aid Applicants for Award Year.
- Part IV, Section C. FSEOG Program: Total Funds to FSEOG Recipients and Non-Federal Share of Funds to FSEOG Recipients.
- Part IV, Section D. Federal Funds Spent for FSEOG Program: Federal Share of Funds to FSEOG Recipients.
- Part VI, Section A. Distribution of Program Recipients and Expenditures by Type of Student.

This section discusses:

- Students selected for the report.
- Assessments and expenditures.
- Information on eligible aid applicants.
- Distribution of program recipients and expenditures by type of student.

Students Selected for the Report

The FISAP report includes only students who:

- Have an FA Term (financial aid term) build source of *T-Term* or *M-Manual*. You can view the source on the FA Term Build Statistics page.
- Have an official Institutional Student Information Record (ISIR) on file. You can view the status of a student's ISIR using the EFC Status (expected family contribution status) field on the Federal EFC Summary page.
- Are eligible citizens based on the Social Security Administration (SSA) Citizenship Indicator database match, DHS/INS database match, and secondary DHS/INS database match. You can view the student's citizenship status in the SSA Citizenship Indicator field on the Database Matches page. Additional logic allows either the DHS/INS Match Override or SSA Citizenship Indicator Override on the Database Matches page to determine eligible citizenship status. To do this, select either the SSA Citizenship Override check box or the DHS/INS Match Override check box or both on the Eligible Aid Applicants for Award Year 20nn-20nn page.
- Have awards with financial aid item types of *FSEOG*, *Federal Perkins Loan*, *Federal Work-Study*, or *Federal Pell Grant* at the time of disbursement. Even if the institution changes the financial aid item type of the award after disbursing the award, the FISAP report still counts the student and the award amount in the proper category.

The FISAP report uses the following rules when categorizing the selected students:

- The most recent effective-dated sequenced ISIR row for students who meet the above report selection criteria.
- The student's National Student Loan Data System (NSLDS) loan year value determines whether the report counts the student as an undergraduate or graduate for the FISAP report.
- If a student is less than full-time based on enrollment status in the final term of the award year, the system counts the student as less than full-time for the entire year for FISAP purposes.
- Total FISAP income is derived directly from the student's ISIR.

- The Central Processing System (CPS) assigns students who meet certain tax filing and income criteria for an automatic EFC of zero. These students have an automatic zero EFC flag set to yes on their ISIR. If set to yes, this flag is on the EFC/DB Matches page in the ISIR Corrections component.

To qualify as an Auto Zero EFC candidate on the report, the CPS must process the student's ISIR as official and must flag it with a *Y* in the Auto Zero EFC field. If you make changes to the student's ISIR record, and INAS determines that the student qualifies as an Auto Zero EFC candidate, schools must have the ISIR reprocessed by the CPS. The FISAP report identifies Auto Zero EFC candidates as all students with a *Y* value for AUTO_ZERO_EFC on the ISIR_COMPUTED table and an *O* value in EFC_STATUS on the ISIR_CONTROL table.

- The third page of the FISAP report identifies graduate students who received an FSEOG as an undergraduate student in a previous term in the same award year. This page is for your information, because these students are included and reported in the appropriate sections of Application Part VI of the Program Summary Grid, based on the Department of Education's instructions. These instructions stipulate that the funds received by these FSEOG recipients should be categorized in the appropriate undergraduate category (dependent or independent by income). If the student received only FSEOG, the student is also included in the undergraduate category for the unduplicated count. If the recipient also received Federal Perkins or Federal Work-Study funds, only the student's undergraduate FSEOG funds must be reported in the appropriate undergraduate category.

The student is then reported in the unduplicated recipients column only once by using the student's career in the final term of the award year (in this case, as a graduate student). For Federal Perkins and Federal Work-Study students, a student's career for the final term of the award year determines a student's career for FISAP purposes. To verify manually that these students are categorized correctly, use the information on the third page of the SQR report. The system does not generate a third page if no graduate students with an FSEOG exist.

Assessments and Expenditures

Part II, Section E of the FISAP report lists total expenditures in dollar amounts. The report process gathers award disbursement information based on financial aid item type setup to calculate the total Pell, ACG and SMART grant expenditures for the aid year. Financial aid item type is defined with a Source value of *Federal* and a Federal ID value of *Pell*, *ACG*, or *SMART* on the Financial Aid Item Type 1 page. These totals include all students who received a Pell, ACG and/or SMART grant award, regardless of NSLDS loan year.

The system calculates the total for state grant and scholarship expenditures to undergraduates for the award year from award disbursement information based on financial aid item type setup. Financial aid item type setup is defined with a Source value of *State* and a Federal ID value of *Grant* or *Scholarship* on the Financial Aid Item Type 1 page. For each term, the student must also be an undergraduate according to their NSLDS loan year (NSLDS loan years 0 through 5). The calculation does not gather award disbursement information for terms when the student is a graduate.

See Also

Chapter 5, "Setting Up Packaging Basics," Defining Financial Aid Item Types, page 112

Chapter 41, "Authorizing and Disbursing Financial Aid," page 1627

Information on Eligible Aid Applicants

Part II, Section F of the report lists the number of eligible aid applicants in an institution by income level. At various taxable and untaxed income levels, it tracks the following information:

<i>FISAP Report Column</i>	<i>Eligible Aid Applicants</i>
A	Dependent undergraduates without degrees.
B	Dependent undergraduates with degrees.
C	Independent undergraduates without degrees.
D	Independent undergraduates with degrees.
E	Graduate and professional students.

Distribution of Program Recipients and Expenditures by Type of Student

Part VI, Section A lists the number of students receiving Federal Perkins, FSEOG, and Federal Work-Study awards at various undergraduate dependent, undergraduate independent, and graduate and professional income levels. You can view both the number of recipients and amount of funds for each aid type. This section also lists totals for each aid type and for "automatic" zero EFC students, and provides a summary of funds and recipients at each income level.

The counts in this section of the FISAP report are unduplicated counts because the system counts each student once, whether or not a student receives multiple types of awards.

<i>FISAP Report Column</i>	<i>Distribution of Program Recipients</i>
A	Federal Perkins Loan Recipients
B	Federal Perkins Loan Funds
C	FSEOG Recipients
D	FSEOG Funds
E	FWS Recipients
F	FWS Funds

<i>FISAP Report Column</i>	<i>Distribution of Program Recipients</i>
G	Unduplicated Count of Students

Producing the FISAP Report

This section discusses how to:

- Generate the FISAP report.
- (Optional) Use FISAP queries.

Page Used to Produce the FISAP Report

Note. Before you use a FISAP run control component for the first time in a new aid year, be sure to update your security profiles for correct viewing and use.

The aid year for this page is indicated by *20nn - 20nn* in the page name and navigation path, and *nn* in the object name.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Report on Eligible Aid Applicants for Award Year 20nn - 20nn	RUNCTL_FA_FISAPnn	Financial Aid, Fund Management, Generate FISAP Reports, FISAP Report 20nn-20nn	Generate the FISAP report.

Generating the FISAP Report

Access the Report on Eligible Aid Applicants for Award Year 20nn - 20nn page (Financial Aid, Fund Management, Generate FISAP Reports, FISAP Report 20nn-20nn).

Report on Eligible Aid Applicants for Award Year 2008 - 2009

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Institution PeopleSoft University ▼

Aid Year Financial Aid Year 2008 - 2009 ▼

Overrides

SSA Citizenship Override ☐ **DHS/INS Match Override** ☐

Print Student List

Print Student List ☐

Output Type ▼

File Path

Report on Eligible Aid Applicants for Award Year 20nn - 20nn page

The system populates, by default, the run controls set up on the Financial Aid Run Controls page. The file name for reports that are generated by this SQR is FAPFSPnn_XX.PDF, where *nn* is the aid year and *XX* is the processing instance.

Institution	Select the institution for which you want to generate the FISAP report. This list reflects those institutions or satellite campuses that you have previously identified.
Aid Year	Select the aid year for which you are reporting, not the aid year for which you are applying.
SSA Citizenship Override	Select if you want the report to include students with an SSA Citizenship Indicator override on the Database Matches page as eligible citizens on the FISAP.
DHS/INS Match Override	Select if you want the report to include students with a DHS/INS Match override on the Database Matches page as eligible citizens on the FISAP.
Print Student List	When you select this check box, the system prints an itemized list of all students in these two sections: Part II Section F and Part VI Section A.

Output Type

Select from: *Both Paper and CSV File*, *CSV File*, and *Paper*.

When you select *Both Paper and CSV File*, the system creates five separate and distinct comma delimited files in the location entered in the File Path field. The details are described as follows:

ELIGAPPL: Eligible Applicant Detail: This file is an itemized list of the student data counted in Part II Section F. The file is sorted in the following order: by report column letter, by FISAP Total Income, and then by EMPLID. After the system prints the details of each report column letter, it prints a row with the totals for that column letter.

The remaining four files are itemized details of Part VI Section A by fund.

DISTFWSP: Federal Work Study Distribution Detail

DISTPERK: Perkins Distribution Detail

DISTSEOG: SEOG Distribution Detail

DISTUNDP: Unduplicated Count Detail

The four distribution files are sorted in the following order: by Student Type, by FISAP Total Income, and then by EMPLID. Student Type is defined as follows:

1DUG: Dependent Undergraduate Students

2IUG: Independent Undergraduate Students

3GRAD: Graduate Students

4LTFT: Less Than Full Time Students

50EFC: Automatic Zero EFC Students

File Path

Enter the file path and directory name where the CSV file should be written. The process scheduler server must be able to read and write to this path.

After running this report, check the SQR log for messages. If a student has a blank NSLDS loan year or a student with an FSEOG award has a graduate or professional NSLDS loan year for the final term of the award year, the system generates an error in the SQR log when you run the FISAP report. These errors do not prevent the system from generating the FISAP report.

Using FISAP Queries

These queries are provided as data analysis tools only and are not supported by functionality.

The queries in the following table are available as a baseline data verification tool with which you can define additional queries to meet your institution's needs. No menu path is available. Instead, access the People Tools Query. Use the queries to analyze and compare data after the FISAP SQR has been processed.

Note. To run the FISAP queries, you might need to add tables to either the query tree QUERY_TREE_FA or to a custom query tree, which is accessible to the person who runs the FISAP queries. FISAP queries access the tables in the following list, which are included in the QUERY_TREE_FA. Review your implemented QUERY_TREE_FA, your custom query tree, or both to ensure that all tables accessed by the FISAP queries are included in either of these query trees. Add only those tables that are not already there.

DISB_ID_TBL

FISAP_STDNT_VW

ISIR_COMPUTED

ISIR_CONTROL

ISIR_STUDENT

ITEM_TYPE_FA

PERSONAL_DTSAVW

STDNT_AID_ATRBT

STDNT_AWARDS

STDNT_AWRD_DISB

STDNT_FA_TERM

TERM_TBL

<i>Query ID</i>	<i>Query Objective and Description</i>	<i>Note</i>
QUERIES TO SUPPORT APPLICATION PART II - Section F		
FISAP_ELIG_APP_GRAD_IND	This query identifies graduate professional students for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column E.
FISAP_ELIG_APP_UGRD_DEP_DEG	This query identifies dependent undergraduate students with a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column B.
FISAP_ELIG_APP_UGRD_DEP_NOT_FT	This query identifies dependent undergraduate students who are less than full-time in the final term of their award year for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F.

Query ID	Query Objective and Description	Note
FISAP_ELIG_APP_UGRD_DEP_NO_DEG	This query identifies dependent undergraduate students without a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column A.
FISAP_ELIG_APP_UGRD_IND_DEG	This query identifies independent undergraduate students with a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column D.
FISAP_ELIG_APP_IND_NO_DEG	This query identifies independent undergraduate students without a prior degree for Application Part II - Section F on a detail level.	If necessary, make appropriate line item adjustments to Application Part II - Section F, Column C.
QUERIES TO SUPPORT APPLICATION PART VI - PROGRAM SUMMARY - Section A		
FISAP_DISTRIBUTION_AUTO_0_EFC	This query identifies students who received Campus-Based funds and whose EFC is considered to be an Auto Zero EFC. The Auto Zero EFC is based on data that is obtained from the student's ISIR record.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Item #18.
FISAP_DISTRIBUTION_GRAD	This query identifies Campus-Based funds that are disbursed to graduate and professional students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Item #15.
FISAP_DISTRIBUTION_UGRD_DEPEND	This query identifies Campus-Based funds that are disbursed to dependent undergraduate students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Items #1-7.
FISAP_DISTRIBUTION_UGRD_IND	This query identifies Campus-Based funds that are disbursed to independent undergraduate students for Application Part VI - Section A on a detail level.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data, Items #8-14.

Query ID	Query Objective and Description	Note
FISAP_NO_DISB_IN_GRAD_MAX_TERM	This query identifies graduate students who did not receive Campus-Based funds in the final term of their award year. This same group of students, however, received Campus-Based funds as undergraduates in previous terms in the same award year.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.
FISAP_NO_DISB_NOT_FT_MAX_TERM	This query identifies students who did not receive Campus-Based funds and whose enrollment status is classified as less than full-time in the final term of their award year.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.
FISAP_DISTRIBUTION_LTFT	This query identifies every disbursement for all students who have Perkins, Federal Work-Study, or FSEOG awards, and whose enrollment status for the last term of the award year is less than full-time.	If necessary, make appropriate line item adjustments to Application Part VI - Program Summary data.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query, "PeopleSoft Query Security"

Enterprise PeopleTools 8.48 PeopleBook: Security Administration, "Implementing Query Security"

Chapter 46

Using Common Origination and Disbursement

The Office of Federal Student Aid (FSA) Common Origination and Disbursement (COD) System processes financial aid award origination and disbursement data using the Common Record XML-format. The Common Record uses common data elements, definitions, edits, and structure. The Oracle Campus Solutions Financial Aid System uses the Common Record to exchange origination and disbursement data for the Pell Grant, Direct Loan, Academic Competitiveness Grant (ACG), and Science and Mathematics Access to Retain Talent (SMART) programs.

This chapter discusses how to:

- Review COD setup.
- Create COD files.
- Review COD data.
- Load COD XML files.
- Submit documents.
- Use common origination message classes.

See Also

The Common Origination and Disbursement System (COD) Technical Reference

Reviewing COD Setup

Before processing COD files, you must complete the appropriate COD award program setup options: Pell Payment, Direct Loans and ACG/SMART. Verify that you have done the setup indicated in the following table.

Warning! Do not change Pell ID Reporting values in the middle of an aid year. The Pell Grant payment and origination processes reference student awards which are in an Institution context and not directly related to a Pell ID. The Pell ID Reporting for Pell Grant processing is derived from the Institution using the Pell Payment Setup.

Process	Steps
Pell Payment	Select the COD Full Participant check box on the Pell Payment Setup page (PELL_PMT_OPTION) and enter your SFA Common School ID. Enter the corresponding Common School ID for each Attended Pell ID on the Pell Attending page (PELL_ATTENDING).
Direct Loan	Select the COD Full Participant check box on the Loan Institution Table (LOAN_INST_TABLE) and enter your SFA Common School ID in the COD Common ID field.
ACG and SMART awards	Enter the disbursement offset and indicate whether to restrict the reporting of disbursement information to COD.

See [Chapter 13, "Setting Up for Pell Payment Processing," Defining Pell Payment Setup, page 421.](#)

See [Chapter 12, "Setting Up Direct Loans," Setting Up Loan Institution Table for Direct Lending COD, page 398.](#)

See [Chapter 6, "Setting Up ACG and SMART Grants," page 147.](#)

Creating COD Files

Each COD award program has its own outbound process. Run the appropriate outbound process to create XML records in the Common Record format for the type of COD award program for which you want to exchange data.

This section lists common elements and discusses how to:

- Create a COD file for Pell.
- Create a COD file for Direct Loans.
- Create a COD file for ACG or SMART.
- Process COD names and addresses.

Common Elements Used in This Section

Schema Version

Select 2.0 to process aid years prior to 2009-2010.

Select 3.0 (default value) for aid years 2009-2010 and beyond. The system determines the correct version of COD Schema 3.0 based on Aid Year.

Note. The Oracle Campus Solutions Financial Aid system does not support COD Common Record XML transmission of TEACH origination and disbursement data.

Page Used to Create COD Files

Page Name	Definition Name	Navigation	Usage
Pell Outbound	SFA_RUNCTL_PL_OUT	Financial Aid, File Management, COD Full Participant, Generate Pell Data, Pell Outbound	Generates COD Origination and Disbursement records for Pell, inserts data in the COD staging tables, and creates an XML file that contains Common Records.
Direct Loan Outbound	SFA_RUNCTL_DL_OUT	Financial Aid, File Management, COD Full Participant, Generate Direct Loan Data, Direct Loan Outbound	Generates COD Origination and Disbursement records for Direct Loan, inserts data in the COD staging tables, and creates an XML file that contains Common Records.
ACG/SMART Outbound	SFA_RUNCTL_AS_OUT	Financial Aid, File Management, COD Full Participant, Generate ACG/SMART Data, ACG/SMART Outbound	Generates COD Origination and Disbursement records for ACG and SMART, inserts data in the COD staging tables, and creates an XML file that contains Common Records.

Creating a COD File for Pell

Access the Pell Outbound page (Financial Aid, File Management, COD Full Participant, Generate Pell Data, Pell Outbound).

Pell Outbound

Run Control ID: PELL_FA0865 [Report Manager](#) [Process Monitor](#) Run

Selection Criteria
Find
First
1 of 1
Last

*Academic Institution PSUNV

*Aid Year 2011

*SFA Common School ID 76543210

*Schema Version Ver 3.0

*File Path and Name \\BURSQA01\rat02\pell cod\fa0865.xml

☒ Pell Origination Outbound

☐ Pell Disbursement Outbound

☐ Send Disb if Verification 'W'

Pell Outbound page

The Pell Outbound process (PELLOUT) updates Pell origination tables, updates the COD staging table, and creates an XML file that contains Common Records. You can run this process for multiple attending school IDs by inserting additional rows. The process has two steps:

1. FAPPLOUT selects all originated Pell grants that are ready for transmission. If all data required to transmit the award is present, the data is moved to the COD staging tables. Selected records that are not processed are documented in the message log of the process.
2. SFA_COD_OUT creates the common record XML file in the location and name specified in the run control.

SFA Common School ID Select your institution's identification number.
(student financial
assistance common school
identification)

File Path and Name	Enter the file path for which the process should create the XML file in and the name of the XML file. File names must include '.xml' at the end of each filename.
Pell Origination Outbound	Select this check box to process Pell origination outbound records.
Pell Disbursement Outbound	Select this check box to process Pell disbursement outbound records. When you select Pell disbursement, the system automatically activates the Pell Origination Outbound check box.
Send Disb if Verification "W" (send disbursement if verification "W")	Select this check box to send the disbursement if the verification status code is W (without documentation). This value is used only for disbursement.

Creating a COD File for Direct Loans

Access the Direct Loan Outbound page (Financial Aid, File Management, COD Full Participant, Generate Direct Loan Data, Direct Loan Outbound).

Direct Loan Outbound

Run Control ID: DLHE [Report Manager](#) [Process Monitor](#) Run

Selection Criteria Find First 1 of 1 Last

<p>*Academic Institution <input type="text" value="PSUNV"/> </p> <p>*Aid Year <input type="text" value="2011"/> </p> <p>*Academic Career <input type="text" value="UGRD"/> </p> <p>*Schema Version <input type="text" value="Ver 3.0"/> </p> <p>*File Path and Name <input type="text" value="\\kccand2211988\CODOUT\FAD0872"/></p>	<p><input checked="" type="checkbox"/> Originations + -</p> <p><input type="checkbox"/> Origination Changes</p> <p><input type="checkbox"/> Disbursements</p> <p><input type="checkbox"/> Validate Only</p>
--	--

Direct Loan Outbound page

The Direct Loan Outbound process (DLOUT) updates Direct Loan origination tables, updates the COD staging table, and creates an XML file that contains Common Records. You can run this process for multiple Academic Careers within an Academic Institution/Aid Year. A separate and unique XML file name must be entered for each distinct Academic Career.

1. FAPDLOUT selects all originated Direct Loans that are ready for transmission. If all data required to transmit the award is present, the data is moved to the COD staging tables. Selected records that are not processed are documented in the message log of the process.
2. SFA_COD_OUT creates the common record XML file in the location and name specified in the run control.

File Path and Name	Enter the file path for which the process should create the XML file in and the name of the XML file. File names must include '.xml' at the end of each filename.
Originations	Select this check box to process Direct Loan origination outbound records.
Origination Changes	Select this check box to process changes to Direct Loan origination outbound records.
Disbursements	Select this check box to process Direct Loan disbursement outbound records.
Validate Only	Appears only when the Originations check box is selected. If you select both Originations and Validation Only check boxes, the system runs your origination in simulation mode. Use this feature to check your originated data on the View Direct Loan, Loan Processing Actions component for statuses and errors. After you verify your data, clear the Validation Only check box and run your process again.

Creating a COD File for ACG or SMART

Access the ACG/SMART Outbound page (Financial Aid, File Management, COD Full Participant, Generate ACG/SMART Data, ACG/SMART Outbound).

ACG/SMART Outbound

Run Control ID: ASG2011 [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria Find First 1 of 1 Last

'Academic Institution' PSUNV

'Aid Year' 2011

'Academic Career' UGRD

'SFA Common School ID' 76543210

'Schema Version' Ver 3.0

'File Path and Name' Wrtdc78763vmc\Temp\SMT2011.XML

☒ Origination ☐ Origination and Disbursement

ACG/SMART Outbound page

The COD ACG/SMART Outbound process (ASGOUT) is a two-step PSJob:

- The FAPASOUT process selects all originated grants that are ready for transmission. If all required data is present, the data is moved into the COD staging tables. Selected records that are not processed are documented in the message log.
- The SFA_COD_OUT process creates the common record XML file in the location and name you specify. When sending the files to COD, be sure to use the correct grant message class names for these files.

Academic Institution Select the institution for which you want to create an XML file.

Academic Career Select the academic career of the records selected for processing.

SFA Common School ID Select your institution's identification number, the same number used for Pell reporting.

File Path and Name Enter the file path and file name for which the process should create the XML file. File names must include '.xml' at the end of each filename.

Origination Select this check box to process origination outbound records.

Origination and Disbursement Select this check box to process disbursement outbound records. When you select this option, origination records are also processed.

Processing COD Names and Addresses

The system retrieves student name information that is submitted to the COD for processing from ISIR tables and Campus Community. To process a name change, change the name on the Campus Community Bio/Demographic pages and process an ISIR correction through the FAFSA Information component (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR Records, FAFSA Information).

COD returns a warning edit (Edit 120) when a complete student address does not exist on the incoming record. Therefore, both Direct Lending and Pell COD addresses must come from the same sources:

- Campus Community (Managing Biographical Information, Managing Addresses and Phone, Addresses)
- Address Usage page that is based on your ISIR Address Usage parameters and the owning School Code that you select.

You cannot override the address using the Direct Loan Address page. Process any changes to the student's address in Campus Community using the override or correction functionality in ISIR address.

See Also

[Chapter 22, "Processing Federal Financial Aid Applications," Reviewing FAFSA Information, page 622](#)

Reviewing COD Data

The View COD Data component is used to view all COD data for all COD award programs supported by the system: Pell Grant, Direct Loan, ACG, and SMART. The View COD Data component presents both inbound and outbound COD data.

This section discusses how to:

- View COD document information.
- View document response information.
- View COD school information.
- View reporting school summary information.
- View reporting school response.
- View attended school response.
- View student biographical and demographic information.
- View student address information.
- View student phone number information.
- View student response data.
- View a student's award information.

- View responses to award rejections and corrections.
- View additional loan information.
- View loan response information.
- View borrower information.
- View borrower address information.
- View borrower phone number information.
- View borrower response data.
- View disbursement information.
- View responses to disbursement rejections and corrections.

Common Elements Used in This Section

Document ID	Displays the date and time stamp with the Source Entity ID.
Document Type	Displays the type of document being returned from COD. Values are: BN: Booking Notification CO: Credit Decision Override ND: Negative Disbursement PS: Payment to Servicing PN: Promissory Note RC: Receipt RS: Response SG: System Generated SP: PLUS Application Acknowledgement WB: Web Initiated
Processing Status	Displays the status of the batch: <i>Outbound and Generated for outbound files</i> <i>Processed and Loaded for inbound files</i>

Reset	<p>Available when you outbound a file to allow you to regenerate the XML file. When you select Reset, the system opens the File Path and Name field and updates the processing status from <i>Generated</i> to <i>Outbound</i>. You can correct and update the path if necessary. You must save the page before exiting to save the status change. Then when you rerun PELLOUT, DLOUT or ASGOUT, the system regenerates an XML file using the same Document ID. Running this process only calls the Application Engine section of the outbound process (PELLOUT/DLOUT/ASGOUT). The system creates an XML file only for records with the same Document ID associated with the reset process.</p> <p>You can update the File and Name path in the run control if you are certain that these are the <i>only</i> records to be picked up by the PELLOUT/DLOUT/ASGOUT process.</p> <hr/> <p>Note. You must use a unique file path and name when you run the PELLOUT, DLOUT, or ASGOUT process. If they are not unique, the new records overwrite the reprocessed records in the XML file creation. File names must include '.xml' at the end of the filename.</p> <hr/>
Receipt Date	Displays the date and time stamp indicating receipt of the document at COD.
Document Status	<p>Displays the status of the processed document on COD. Values are:</p> <p>A: Accepted</p> <p>R: Rejected</p> <p>D: Duplicate</p>
Process Date	Displays the date the document information was processed at COD.
ID	Displays the student's unique identification.
Reporting School ID	Displays an identification that provides a logical grouping of elements related to Reporting School Entity Information.
Attending School ID	Displays an identification that provides a logical grouping of elements related to Attending School Entity Information.
Response Indicator	<p>Displays the result of processing the COD. Values are:</p> <p>A: Accepted</p> <p>R: Rejected</p> <p>D: Duplicate</p> <p>C: Corrected</p>
Address Sequence	Identifies the order in which address updates occurred. Values are 1 and 2.
Phone Sequence	Identifies the order in which phone number updates occurred. Values are 1, 2, and 3.

Response Sequence Number(error code sequence)

Identifies the order in which error codes were received. Values are 1 through 999.

Pages Used to Review COD Data

Page Name	Definition Name	Navigation	Usage
COD Document	SFA_COD_DOCUMENT	Financial Aid, File Management, COD Full Participant, View COD Data, COD Document	View information at the COD document level on your outbound and inbound XML record transmissions.
Document Response	SFA_COD_DOC_RSP	Click the Response Information link on the COD Document page.	View document level response rejection or correction information from COD.
COD School Information	SFA_COD_SCHOOL_INF	Financial Aid, File Management, COD Full Participant, View COD Data, COD School Information	View summary and response information at the reporting and attending school level.
Reporting School Summary	SFA_COD_RPRTSCHL_SUM	Click the Reporting School Summary link on the COD School Information page.	View document summary totals by award type.
Reporting School Response	SFA_COD_REPORT_RSP	Click the Reporting School Response link on the COD School Information page.	View reporting school level response rejection or correction information.
Attended School Response	SFA_COD_ATTEND_RSP	Click the Response Information link on the COD School Information page.	View attending school level response rejection or correction information.
COD Student	SFA_COD_STUDENT	Financial Aid, File Management, COD Full Participant, View COD Data, COD Student	View a student's biographical and demographic information.
Student Address	SFA_COD_ADDRESS	Click the Address Information link on the COD Student page.	View student address information.
Student Phone	SFA_COD_PHONE	Click the Phone Number Information link on the COD Student page.	View student phone number information.

Page Name	Definition Name	Navigation	Usage
Student Response	SFA_COD_STU_RSP	Click the Response Information link on the COD Student page.	View response data for rejections or corrections.
COD Award	SFA_COD_AWARD	Financial Aid, File Management, COD Full Participant, View COD Data, COD Award	View a student's award information.
Award Response	SFA_COD_AWARD_RSP	Click the Response Information link on the COD Award page.	View responses to award rejections and corrections.
Loan Information	SFA_COD_LOANINFO	Click the Additional Loan Information link on the COD Award page.	View additional loan information.
Loan Response	SFA_COD_LN_RSP	Click the Response Information link on the Loan Information page.	View loan level response rejection or correction information.
Borrower Information	SFA_COD_BORROWER	Click the Borrower Information link on the COD Award page.	View borrower information.
Borrower Address	SFA_COD_BORR_ADDR	Click the Address link on the Borrower Information page.	View borrower address information.
Borrower Phone	SFA_COD_BORR_PHONE	Click the Phone Number Information link on the Borrower Information page.	View borrower phone information.
Borrower Response	SFA_COD_BORR_RSP	Click the Response Information link on the Borrower Information page.	View borrower level response rejection or correction information.
COD Disbursement	SFA_COD_DISB	Financial Aid, File Management, COD Full Participant, View COD Data, COD Disbursement	View disbursement information, including disbursement amount and disbursement date.
Disbursement Response	SFA_COD_DSB_RSP	Click the Response Information link on the COD Disbursement page.	View responses to disbursement rejections and corrections.

Viewing COD Document Information

Access the COD Document page (Financial Aid, File Management, COD Full Participant, View COD Data, COD Document).

COD Document		COD School Information		COD Student		COD Award		COD Disbursement	
Document ID	2010-01-04T13:29:09.0576543210				Process Date	2010-01-04			
Document Type	RS				Document Status	A			
Document Information									
Created Date & Time	2010-01-04T13:29:09.05				Full Response Flag	F			
Source Type	School				Receipt Date				
Source ID	01234567				Processing Status	Processed			
Destination Type	COD				Inbound DateTime	01/04/2010 1:52PM			
Destination ID	00000001				Outbound DateTime	01/04/2010 1:29PM			
Software Provider	PEOPLESOFT				Schema Version	Version 3.0			
Software Version	0506R1				Response Information				
File Path and Name	\\BURSQA01\rat02\pell cod\fa0872resp.xml								

COD Document page

This page displays information at the COD document level on your outbound and inbound XML record transmissions. Refer to your COD Full Participant technical reference for field definitions not described below.

Inbound Date Time	Indicates the date and time that the file was loaded into your system.
Outbound Date Time	Indicates the date and time that the file was created for outbound transmission to the COD system.
Response Information	Click this link to access the Document Response page to review document level response rejection or correction information.

Viewing Document Response Information

Access the Document Response page (click the Response Information link on the COD Document page).

Document Response

Find | View All First ◀ 1 of 1 ▶ Last

Response Sequence Number
Response Error Code
Response Message
Response Error Field
Response Error Value
Reported Value

Document Response page

This page displays rejection or correction information from COD.

Viewing COD School Information

Access the COD School Information page (Financial Aid, File Management, COD Full Participant, View COD Data, COD School Information).

COD Document **COD School Information** COD Student COD Award COD Disbursement

Document ID 2004-09-15T10:37:09.7912345678

Reporting School

Reporting School ID 12345678 **Response Code** A

Reported Financial Summary

Award Type	Award Year	Total Students	Total Award Amt Reported	Total Disb Amt Reported
DLPLUS	2005	1	15200.00	15200.00
DLSubsidized	2005	1	3500.00	3500.00

[Reporting School Summary](#) [Reporting School Response](#)

Attended School

Attended School ID 12345678 **Response Code** A
[Response Information](#)

COD School Information page

This page displays summary and response information at the reporting and attending school level.

Reporting School Summary	Click this link to access the Reporting School Summary page to review document summary totals.
Response Information	Click this link to access the Attended School Response page to review attending school level response rejection or correction information.
Reporting School Response	Click this link to access the Reporting School Response page to review reporting school level response rejection or correction information.

Viewing Reporting School Summary Information

Access the Reporting School Summary page (click the Reporting School Summary link on the COD School Information page).

Reporting School Summary			
		Find View All	First 1 of 2 Last
Award Type	DLPLUS	Award Year	2005
Total Number of Students	1	Total Award Amt Reported	15200.00
Total Count Accepted	1	Total Disb Amt Reported	15200.00
Total Count Rejected	0	Total Award Accepted	15200.00
Total Count Corrected	0	Total Disbursement Accepted	15200.00
Total Count Duplicate	0	Total Funded Disb Accepted	0.00
Total Count Verif Selected	0	Total NonFunded Disb Accepted	15200.00
Total Count SSA	0	Total Financial Awd Corrected	0.00

Reporting School Summary page

This page displays document summary totals by award type.

Viewing Reporting School Response

Access the Reporting School Response page (click the Reporting School Response link on the COD School Information page).

Reporting School Response

Find | View All

First1 of 1Last

Response Sequence Number	
Response Error Code	
Response Message	
Response Error Field	
Response Error Value	
Reported Value	

Reporting School Response page

This page displays reporting school level response rejection or correction information.

Viewing Attended School Response

Access the Attended School Response page (click the Response Information link on the COD School Information page).

Attended School Response

Find | View All

First1 of 1Last

Response Sequence Number	
Response Error Code	
Response Message	
Response Error Field	
Response Error Value	
Reported Value	

Attended School Response page

This page displays attended school level response rejection or correction information.

Viewing Student Biographical and Demographic Information

Access the COD Student page (Financial Aid, File Management, COD Full Participant, View COD Data, COD Student).

COD Document		COD School Information		COD Student		COD Award		COD Disbursement	
Document ID		2004-09-15T10:37:09.7912345678				Reporting School ID		12345678	
ID		FAD0125				Attended School ID		12345678	
Identifiers									
SSN ID		539900728				Birthdate ID		1982-03-21	
Last Name ID		LAI							
Student Information									
SSN		539900728				Drivers License State			
Birthdate		1982-03-21				Drivers License Number			
First Name		JESSICA				Citizenship Status		1	
Middle Initial		E				Note Message		FAD0125	
Last Name		LAI				Response Code		A	
Email Address									
Address Information				Phone Number Information				Response Information	

COD Student page

- Address Information

Click this link to access the Student Address page to review student address information.
- Phone Number Information

Click this link to access the Student Phone page to review student phone number information.
- Response Information

Click this link to access the Student Response page to review response data for rejections or corrections.

Viewing Student Address Information

Access the Student Address page (click the Address Information link on the COD Student page).

Student Address

Find | View All

First1 of 1Last

Address Type

Permanent

Foreign Address

Address Line 1

4305 SHELBOURNE LANE

Address Line 2

Address Line 3

City

COLUMBUS

County

State/Province

OH

Postal Code

43220

Country

Student Address page

This page displays address information that you report for the student.

Viewing Student Phone Number Information

Access the Student Phone page (click the Phone Number Information link on the COD Student page).

Student Phone	
Phone Type	Phone Number
Permanent	6144593245

Student Phone page

This page displays phone number information that you report for the student.

Viewing Student Response Data

Access the Student Response page (click the Response Information link on the COD Student page).

Student Response

Find | View All

First 1 of 1 Last

Response Sequence Number	
Response Error Code	
Response Message	
Response Error Field	
Response Error Value	
Reported Value	

Student Response page

This page displays student level response rejection or correction information.

Viewing a Student's Award Information

Access the COD Award page (Financial Aid, File Management, COD Full Participant, View COD Data, COD Award).

The COD Award tab provides detailed data for each COD award program: Pell Grant, Direct Loans, ACG, and SMART. Each COD award program has its own separate information section.

COD Document		COD School Information		COD Student		COD Award		COD Disbursement	
Document ID	2010-01-04T13:29:09.0576543210				Reporting School ID	01234567			
ID	FA0872				Attended School ID	76543210			
Award Block					Find View All First 1 of 1 Last				
Award Name	Pell				CPS Transaction Number	02			
Award Year	2011				Note Message	321800446ZZ0013151			
Award Number	1				Response Code	A			
Award Amount	4350.00				Response Information				
▼ Pell Information									
Attendance Cost	23800.00				Negative Pending Amount				
Low Tuition Fees					FSA Code	CE			
Incarcerated Indicator					CPS Verification Indicator	true			
Verification Status Code	V				Highest CPS Transaction	02			
Enrollment Date	2010-09-06				Academic Calendar Code				
Secondary EFC Code					Payment Methodology				
Year-To-Date Disb Amt	4350.000				Weeks Used to Calc				
Total Eligibility Used	100.000				Weeks Program Acad Yr				
Lifetime Eligibility Used	0100.000				Hours Program Acad Year				
Scheduled Grant	4350				Hours Award Year				
Additional Eligibility	false								

COD Award page (1 of 3)

▼ ACG Information									
Award ID					Lifetime Eligibility Used	0100.000			
Student Level Code					Scheduled Grant	4350			
Enrollment Date	2010-09-06				Negative Pending Amount				
Elig Reason Cd					FSA Code	CE			
HS Prog Cd					CPS Verification Indicator	true			
Year-To-Date Disb Amt	4350.000				Highest CPS Transaction	02			
Total Eligibility Used	100.000								
▼ SMART Information									
Award ID					Lifetime Eligibility Used	0100.000			
Student Level Code					Scheduled Grant	4350			
Enrollment Date	2010-09-06				Negative Pending Amount				
Program CIP Code					FSA Code	CE			
Year-To-Date Disb Amt	4350.000				CPS Verification Indicator	true			
Total Eligibility Used	100.000				Highest CPS Transaction	02			

COD Award page (2 of 3)

▼ Loan Information	
Loan Key	Additional Loan Information
Award ID	Booked Loan Date
Award Create Date	Booked Loan Amount
Dependency Status	Loan Servicer
Entrance Counseling	Year-To-Date Disb Amt 4350.000
Default/Overpay	Payment to Servicer Amt
HPPA Indicator	Payment to Servicer Date
PreProfessional Coursewrk	eMPN Indicator
Additional Unsubsidized	MPN ID
Award Amt Requested	MPN Status
Application Id	MPN Link Indicator
Application Complete Date	MPN Expire Date
Application Loan Amount	Entrance Counseling Response
Maximum Loan Indicator	Credit Decision Date
Loan Period Start Date	Credit Decision Expiration Dt
Loan Period End Date	Credit Override Code
Deferment Option	Credit Decision Status
Six Month Deferment Option	Original Credit Decision Stat
Credit Balance Option	Credit Action Choice
School Credit Balance Option	Credit Appeal Status
	Endorser Amount
	Borrower Information
▼ Other Information	
Federal Share Amount	FISAP Income Amount
Less Than FullTime	Student Level Code

Save
 Return to Search
 Notify
 Previous tab
 Next tab

COD Award page (3 of 3)

Additional Loan Information

Click this link to access the Loan Information page to review additional loan information.

Borrower Information

Click this link to access the Borrower Information page to review borrower information.

Viewing Responses to Award Rejections and Corrections

Access the Award Response page (click the Response Information link on the COD Award page).

Award Response

[Find](#) | [View All](#) First ◀ 1 of 1 ▶ Last

Response Sequence Number	
Response Error Code	
Response Message	<div></div>
Response Error Field	
Response Error Value	<div></div>
Reported Value	<div></div>

Award Response page

This page displays student award level response rejection or correction information.

Viewing Additional Loan Information

Access the Loan Information page (click the Additional Loan Information link on the COD Award page).

Loan Information

Loan Key	2	Student Level Code	3
Origination Fee Percentage	4.00	Award Begin Date	2004-08-30
Interest Rebate Percentage	1.5	Award End Date	2005-05-08
PNote Print Code	O	Academic Year Begin Date	2004-08-15
Disclosure Print Code	Y	Academic Year End Date	2005-06-30
		Response Code	A
		Response Information	

Loan Information page

Response Information Click this link to access the Loan Information Response page to review rejection or correction information.

Viewing Loan Response Information

Access the Loan Response page (click the Response Information link on the Loan Information page).

Loan Response

Find | View All

First1 of 1Last

Response Sequence Number

Response Error Code

Response Message

Response Error Field

Response Error Value

Reported Value

Loan Response page

This page displays student loan award level response rejection or correction information.

Viewing Borrower Information

Access the Borrower Information page (click the Borrower Information link on the COD Award page).

Borrower Information

Identifiers

Find | View All

First1 of 1Last

Borrower ID

FA0277

Birthdate ID

1949-06-06

Last Name ID

TESTLOAN1

SSN ID

078680999

Borrower Info

SSN

078680999

First Name

PARENT

Drivers License State

Middle Initial

A

Drivers License Number

Last Name

TESTLOAN1

Birthdate

1949-06-06

Default/Overpay

N

Citizenship Status

1

Note Message

FA0277

Email Address

Response Code

A

[Response Information](#)

[Address Information](#)

[Phone Number Information](#)

Borrower Information page

This page displays borrower information and provides access to the borrower's address, telephone number, and response information.

- Address Information

Click this link to access the Borrower Address page to view the borrower's address.
- Response Information

Click this link to access the Borrower Response page to view the borrower's response information.
- Phone Number Information

Click this link to access the Borrower Phone Number page to view the borrower's telephone number.

Viewing Borrower Address Information

Access the Borrower Address page (click the Address link on the Borrower Information page).

Borrower Address

Find | View All

First 1 of 1 Last

Address Type

Permanent

Foreign Address

Address Line 1

123 FIRST STREET

Address Line 2

Address Line 3

City

ANYTOWN

County

State/Province

AL

Postal Code

123210009

Country

Borrower Address page

This page displays the borrower's address information.

Viewing Borrower Phone Number Information

Access the Borrower Phone page (click the Phone Number Information link on the Borrower Information page).

Borrower Phone	
Phone Type	Phone Number
Permanent	6879854321

Borrower Phone page

This page displays the borrower's telephone information.

Viewing Borrower Response Data

Access the Borrower Response page (click the Response Information link on the Borrower Information page).

Borrower Response

Find | View All

First 1 of 1 Last

Response Sequence Number	
Response Error Code	
Response Message	
Response Error Field	
Response Error Value	
Reported Value	

Borrower Response page

This page displays the borrower's response to rejection or correction information.

Viewing Disbursement Information

Access the COD Disbursement page (Financial Aid, File Management, COD Full Participant, View COD Data, COD Disbursement).

COD Document

COD School Information

COD Student

COD Award

COD Disbursement

Document ID

2004-09-15T10:37:09.7912345678

Reporting School ID

12345678

ID

FAD0125

Attended School ID

12345678

Award Information

Find | View All

First

1 of 2

Last

Award Name

DLPLUS

Award Year

2005

Award Number

1

Disbursement Information

Find | View All

First

1 of 2

Last

Disbursement Number

1

Payment Period Start Date

Disbursement Amount

7600.00

First Disbursement

Disbursement Date

2004-08-20

Disbursement Fee Amount

304.00

Disbursement Release

false

Disbursement Rebate Amount

114.00

Disbursement Sequence

01

Disbursement Net Amount

7410.00

Previous Disb Seq Nbr

00

Disbursement Confirmation

Note Message

Response Code

A

[Response Information](#)

COD Disbursement page

Response Information

Click this link to access the Disbursement Response page to view responses for disbursement rejections and corrections.

Viewing Responses to Disbursement Rejections and Corrections

Access the Disbursement Response page (click the Response Information link on the COD Disbursement page).

Disbursement Response

Find | View All

First 1 of 1 Last

Response Sequence Number

Response Error Code

Response Message

Response Error Field

Response Error Value

Reported Value

Disbursement Response page

This page displays student disbursement level response rejection or correction information.

Loading COD XML Files

This section discusses how to load an XML file. The Import COD Response Data component loads any COD XML file in the COD tables regardless of the COD award program,

Page Used to Load COD XML Files

Page Name	Definition Name	Navigation	Usage
Common Origination and Disbursement Inbound	SFA_RUNCTL_COD_INB	Financial Aid, File Management, COD Full Participant, Import COD Response Data, Common Origination and Disbursement Inbound	Load a COD response or system-generated file into your system.

Loading a COD XML File

Access the Common Origination and Disbursement Inbound page (Financial Aid, File Management, COD Full Participant, Import COD Response Data, Common Origination and Disbursement Inbound).

Common Origination and Disbursement Inbound

Run Control ID: COD_IN
[Report Manager](#)
[Process Monitor](#)
Run

	*File Path and Name		
1	\\wjones2111899\codin\fa08788182.xml	+	-

Common Origination and Disbursement Inbound page

Enter the location and name of the file to import into your system.

The COD Inbound process (CODIN) is a two-step PSJob:

- The SFA_COD_IN process loads the XML file into the COD staging tables.
- The FAPCODIN process updates the origination record and the grant status with the response data.

Submitting Documents

You can submit common record documents to the COD System using the COD website or by batch processing. For batch processing, use the SAIG Electronic Data Exchange.

Note. The system does not process COD web-initiated response files (document type WB) or PLUS Application Acknowledgment files (document type SP). The system only loads the data from these two document types into the COD staging tables to view.

Note. There must be a one-to-one match between a system generated outbound record and the corresponding inbound acknowledgement record. For example, a Direct Loan Origination must be created (and sent to COD) using the Oracle Campus Solutions Financial Aid system. COD provides a corresponding response acknowledgement record using the same Document ID that is used to match and update the appropriate document and award programs.

Using Common Origination Message Classes

Various message classes are to be used by Full Participants for sending and receiving data to and from the COD System for each current processing year. Oracle supports the message classes listed in the following table. The aid year is indicated by *nn*.

See *The Common Origination and Disbursement System (COD) Technical Reference*

Message Class	Description
COMRECOP	Responses containing data from any or multiple programs for any or multiple award years sent from COD System.

Message Class	Description
COMRECIN	Common Record Documents containing data from any or multiple programs for any or multiple award years sent from school to COD System.
CRAAnnOP	Responses sent from COD System to school for data received in the CRAAnnIN message class.
CRAAnnIN	Common Record Documents containing data from any or multiple programs for the specific Award Year sent from school to COD System.
CRPGnnOP	Responses sent from COD System to school for Pell Grant data for award year received in the CRPGnnIN message class.
CRPGnnIN	Common Record Documents containing Pell Grant data for specific award year sent from school to COD System.
CRDLnnOP	Responses sent from COD System to school for Direct Loan data for award year received in the CRDLnnIN message class.
CRDLnnIN	Common Record Documents containing Direct Loan data for specific award year sent from school to COD System.
CRAGnnOP	Responses sent from COD System to school for ACG data for award year received in the CRAGnnIN message class.
CRAGnnIN	Common Record Documents containing ACG data for specific award year sent from school to COD System.
CRSGnnOP	Responses sent from COD System to school for National SMART Grant data for award year received in the CRSGnnIN message class.
CRSGnnIN	Common Record Documents containing National SMART Grant data for specific award year sent from school to COD System.
CRRCnnOP	Receipts sent from COD System to school for the incoming message classes CRAAnnIN, CRPGnnIN, CRAGnnIN, CRSGnnIN, or CRTHnnIN.
CRBNnnOP	Booking Notification
CRConnOP	Credit Decision Override
CRNDnnOP	Negative Disbursement
CRPSnnOP	Payment to Servicing
CRPNnnOP	MPN Response
PGASnnOP	Pell Electronic Statement of Account (ESOA)
PGMRnnOP	Pell Multiple Reporting Record (MRR)

Message Class	Description
PGRConnOP	Pell Reconciliation Report
PGYRnnOP	Pell Year-to-date Record
AGASnnOP	ACG Electronic Statement of Account (ESOA)
AGMRnnOP	ACG Multiple Reporting Record (MRR)
AGRCnnOP	ACG Reconciliation Report
AGYRnnOP	ACG Year Year-to-date Record
SGASnnOP	National SMART Grant Electronic Statement of Account (ESOA)
SGMRnnOP	National SMART Grant Multiple Reporting Record (MRR)
SGRCnnOP	National SMART Grant Reconciliation Report
SGYRnnOP	National SMART Grant Year
DSDFnnOP	Import School Account Statement (Fixed-Length)
DSLfnOP	Import School Account Statement (Fixed-Length)
PGRQnnIN	Pell Data Request file
AGRQnnIN	ACG Data Request file
SGRQnnIN	SMART Data Request file

See Also

The Common Origination and Disbursement System (COD) Technical Reference

Chapter 47

Using Forms Engine

The primary function of the Forms Engine is to enable high-speed and high-volume printing to PostScript printers. It does this by sending a PostScript print data stream directly to the printer, bypassing any Print Driver routines. It also caches the form layout onto the printer itself so that only the data that changes from page to page must be sent to the printer for each page.

This chapter discusses how to:

- Use the components of Forms Engine.
- Purge form data.
- Modify a form.
- Add data to the form data tables.
- Set up images.
- Change a logo.

Using the Components of Forms Engine

The Forms Engine consists of several components. This section discusses how to:

- Use the application designer.
- Create and modify forms.
- Use the form image text repository.
- Using form image text.
- Upload form image text.
- Review form groups.
- Use output destination formats.
- Specify font names.
- Using PostScript fonts.
- Use the Inquire On Form Data page.

Pages Used with the Forms Engine Components

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Form Editor	FORM_EDITOR	Set Up SACR, Common Definitions, Forms Engine, Set Up, Form Editor, Form Editor	Create and modify forms.
Form Image Text Viewer	FE_IMAGE_TEXT	Set Up SACR, Common Definition, Forms Engine, Set Up, Form Image Text, Form Image Text Viewer	Update Description and Cache From On Printer fields.
Upload EPS Image File	FE_UPIMG_RUNCTL	Set Up SACR, Common Definition, Forms Engine, Process, Upload EPS Image File, Upload EPS Image File	Modify an image that you are rendered on a page by making a new or modified file in encapsulated Postscript (EPS) format.
Form Groups	FORM_GROUP_TABLE	Set Up SACR, Common Definitions, Forms Engine, Set Up, Form Groups, Form Groups	Use to tie a list of forms together.
Output Destination Formats	FE_OUTDESTFMT	Set Up SACR, Common Definition, Forms Engine, Set Up, Out Dest Formats, Output Destination Formats	View parameters for various output formats usable by programs that use the Forms Engine.
Font Names	FONT_NAME_TABLE	Set Up SACR, Common Definitions, Forms Engine, Set Up, Font Names, Font Names	Lists all PostScript font names that you can specify within Form Editor.
PostScript Fonts	POSTSCRIPT_FONTS	Set Up SACR, Common Definitions, Forms Engine, Set Up, PostScript Fonts, PostScript Fonts	View a list of translations using font names as specified in the Application Designer and translate to a PostScript font name.

Using the Application Designer

The Application Designer is not part of the Forms Engine. However, page layouts defined within the Application Designer can be imported into the Form Editor. You can make all of your changes to a form using Application Designer. If you use Application Designer to make changes, you do not need to make changes in Form Editor.

Creating and Modifying Forms

You can create or modify forms using the Form Editor either by importing a page layout from the Application Designer or by manually adding objects to the page definition. If you import a page layout from the Application Designer, the entire contents of the form definition are replaced by the imported page definition.

Access the Form Editor page (Set Up SACR, Common Definitions, Forms Engine, Set Up, Form Editor, Form Editor).

Form Editor

Form: FA_AWD_NOTIF_LTR1

Form Table Find | View All First 1 of 1 Last

'Effective Date: 01/01/1900 ☒ Active

'Description: Fin Aid Notification Letter 'Width: 612 'Height: 793

Preview Import Page Source: Page Def Rel Page: FA_AWD_NOTIF_LTR1 Last Import: 10/23/2006 6:44PM

☒ Set Page Device

Background Color

Red: 1.0000000 Green: 1.0000000 Blue: 1.0000000 Image:

Form Field Names Customize | Find | View 100 | First 1-3 of 110 Last

	*Form Field Name	Sample Text		
1	ACAD_LEVEL	?	+	-
2	AID_YEAR_DESCR	?	+	-
3	AWARD_DESC1	?	+	-

Form Details Customize | Find | View 100 | First 1-5 of 132 Last

	Fldno	Form Field Type	Edit Field Attributes		
1	1	Image	Edit Field Attributes	+	-
2	2	Data Field	Edit Field Attributes	+	-
3	3	Data Field	Edit Field Attributes	+	-
4	4	Data Field	Edit Field Attributes	+	-
5	5	Data Field	Edit Field Attributes	+	-

Form Editor page

Select Set Page Device to force the form to start on a new piece of paper. This is important when you are duplex printing (printing on both sides of the paper). If you do not select Set Page Device, a new form might print on the backside of a piece of paper.

You can add types of objects to forms such as Box, Data Field, Image, Line, Long Text, and Text. You can set attributes for each of these objects such as color, font, position, length, style, scale, spacing, justification, line thickness, dashes, image ID, and literal text. Not all attributes apply to all form child objects. You can specify to have sample text values appear in data fields when you preview the form.

To preview the form that you are editing, click the Preview link. This saves any unsaved changes, generates the PostScript print data stream, and sends the data to your browser. If your browser is configured to display this type of data, it displays the image of the form. If your browser is not configured to display this type of data, you can save the data to a disk directory. If you save the data to a disk directory and give it a file name, give it a (.ps) extension indicating that it is a PostScript file. Copy this file to a postscript printer. The page image renders graphically to that printer.

If you want to view the PostScript preview page image on your browser, click the Get PostScript Viewer link on the Form Editor page. The system displays a website where you can obtain a PostScript View program.

Using the Form Image Text Repository

Access the Form Image Text Viewer page (Set Up SACR, Common Definition, Forms Engine, Set Up, Form Image Text, Form Image Text Viewer).

Image: FERFA_AWD_COVER_LTR
 ☐ Delete EPS Text

Description: Derived, Sent For Each Showpag
 ☐ Cache Form On Printer

From Row: 1 To Row: 20 Row Count: 28

Line	Image Text
1	2 dict dup /PageSize [612 792] put setpagedevice
2	2 FERFA_AWD_COVER_LTR execform
3	3 /Arial findfont
4	4 9 scalefont
5	5 setfont
6	6 16 356 moveto
7	7 InitWrap
8	8 () AppendWrap
9	9 FEFNAME AppendWrap
10	10 (), enclosed please find the promissory note(s) that you have accepted for the academic year () AppendWrap
11	11 FEFAIDYEAR AppendWrap
12	(). A promissory note is a legal and binding contract of your promise to repay the loan according to the terms on the note. Please read the enclosed materials to avoid delays in receiving your loan funds.) AppendWrap
13	13 FETwrapstring 11 556 //leftshow BreakIntoLines
14	14 16 284 moveto
15	15 InitWrap
16	(You have been send one promissory note in duplicate for each type of loan you have been awarded. Please complete and sign the promissory note in black or blue ink only and return the school copy of each promissory note within five (5) d\
17	ays to the Financial Aid Office in the enclosed pre-addressed envelope. Keep the student copy for your records. Processing and disbursement of your loan to your student account will proceed when the promissory note is received by the Final
18	ncial Aid Office.) AppendWrap
19	19 FETwrapstring 11 556 //leftshow BreakIntoLines
20	20 16 200 moveto

Form Image Text page

The form image text is the actual PostScript text that is sent to the PostScript printer. To access the Form Image Text page, select Design Student Administration, Forms Engine, Setup, Form Image Text.

The only fields that you can update on the setup page are Description and Cache Form On Printer. Cache Form On Printer indicates whether the form is sent to the printer only once at the beginning of the print run or each time that the image is needed.

When you save a form layout in the Form Editor, it generates two corresponding entries in the Form Image Text table. The entry that starts with FEP followed by the form name is the static page layout. It is automatically set to cache on the printer. The other entry is the one that starts with FER followed by the form name. It is the runtime portion of the page and is sent each time that the page is printed. The runtime portion combines the page layout with images and wrapped text.

Uploading Form Image Text

To modify an image that is being rendered on a page, you must create a new or modified form image text file in encapsulated PostScript (EPS) format and upload it to an FTP site that you choose. You can then run the process to upload this text into the Form Image Text repository.

Access the Upload EPS Image File page (Set Up SACR, Common Definition, Forms Engine, Process, Upload EPS Image File).

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

*URL:

File Transfer ID:

Operator Password (Encrypted):

Confirm Password:

*Unique System Filename:

*Remote File Name:

*Form Image Name:

Upload EPS Image File page

Follow these steps to upload form image text.

1. Create a run control record.

The URL is the name of the FTP domain to which you had previously uploaded the EPS file. If you uploaded it to the FTP server called MYFTPSITE, then you would enter MYFTPSITE into this field.

2. Enter the ID and password that you used to log on to the FTP site.

3. Retype the password in the Confirm Password field.

The unique system file name should be a file name in 8.3-format without any blank spaces.

Note. Do not enter path information. For example, MYLOGO.EPS is used for the MYLOGO form image text file. The remote file name is the path and name of the file that you specified when you uploaded it to your FTP site. The form image name is the name that Oracle uses as the key to the Form Image Text repository. Our example is MYLOGO.

4. Submit the process.
5. Access the Form Image Text page after the process finishes successfully. Enter a description for the image and select the Cache Form On Printer check box.

To create or modify form image text, you can create or modify the corresponding EPS file in the data directory of ps_home. For example, to create a graphic image called MYLOGO, copy the FAPSULGO.EPS file from the data directory to a file called MYLOGO.EPS. Use a simple text editor to edit it and change every occurrence of FAPSULGO with MYLOGO. You can modify the contents of the image text using a simple text editor and enter PostScript command text to construct an image.

An alternative technique for creating an EPS file for your image is to use some other program to generate the PostScript file. A possible future enhancement to this process is that the program that uploads the EPS Image File will accept files with the .JPG extension and convert them to EPS format while loading them into the Form Image Text repository. Some JPG files convert to EPS files that are too large to cache on the printer. You will have to clear the Cache Form On Printer check box if your image is converted from a JPG file.

Reviewing Form Groups

A form group ties a list of forms together. The Form Group Relative Sequence field indicates the relative order for form groups to be rendered when more than one form group is output into a single print stream. The forms are tied to the form groups within an application program. Because of this, you should not modify these settings unless you are customizing a program.

Access the Form Groups page (Set Up SACR, Common Definitions, Forms Engine, Set Up, Form Groups).

Customize Find View All First 1-4 of 4 Last					
	*Form Group ID	*Description	*Form Group Relative Sequence		
1	FA_AWD_COVER_LTR	Fin Aid Award Cover Letter	10	+	-
2	FA_AWD_NOTIF_LTR	Fin Aid Award Notif Letter	20	+	-
3	FA_AWD_SHORT_LTR	Fin Aid Award Notif Letter	15	+	-
4	SF_CASHIERING	Student Financials Cashiering	1	+	-

Form Groups page

Using Output Destination Formats

Access the Output Destination Formats page (Set Up SACR, Common Definition, Forms Engine, Set Up, Out Dest Formats, Output Destination Formats).

Customize Find View All First 1-4 of 4 Last							
	*Format	*Description	Content Type	Ext	Conversion Script	Print Script	
1	Postscript (*.lis)	PostScript	application/postscript	PS		psprintfile.cmd	+ -
2	Other	JetForm		DAT			+ -
3	Acrobat (*.pdf)	Acrobat PDF	application/pdf	PDF	PSPS2PDF.BAT		+ -
4	Comma delimit	Comma Delimited		CSV			+ -

Output Destination Formats page

This table specifies parameters for various output formats usable by programs, which in turn use the Forms Engine. For example, a program looks at the Print Script field to determine the name of a command script for printing. In the case of the PostScript output destination format, the print script PSPRINTFILE.CMD requires two arguments: the printer name and the file name.

Specifying Font Names

Access the Font Names page (Set Up SACR, Common Definitions, Forms Engine, Set Up, Font Names, Font Names).






















This table contains the list of all PostScript font names that you can specify within the Form Editor.

Customize Find View All First 1-5 of 5 Last				
	*Font Name	Description		
1	Arial	Use Helvetica for Arial	+ -	
2	Courier	Courier	+ -	
3	Helvetica	Helvetica	+ -	
4	sans-serif	sans-serif	+ -	
5	serif	serif	+ -	

Font Names page

Using PostScript Fonts

Access the PostScript Fonts page (Set Up SACR, Common Definitions, Forms Engine, Set Up, PostScript Fonts, PostScript Fonts).

Customize Find View All  First 1-5 of 5 Last					
	*Font Name		*PostScript FontName		
1	Arial		Helvetica		 
2	Helvetica		Helvetica		 
3	helvetica		Helvetica		 
4	sans-serif		sans-serif		 
5	serif		serif		 

PostScript Fonts page

This table is a list of translations that uses a font name as specified in the Application Designer and translates it into a PostScript font name. You must install the font names specified on all of the PostScript printers at your installation.

Using the Inquire On Form Data Page

This page is normally hidden. You should restrict access to this page. It enables you to view any page printed by the Forms Engine and retained in the Form Data tables. Functions that refer to this data have pages and views that restrict the content to data relating to just that function. Use this page to debug problems.

Purging Form Data

To purge form data, you must first write to the Form Data tables and assign an expiration date for every page printed with the Forms Engine. Schedule a daily purge job to run the process to purge expired pages. To determine whether such a job exists, use your query tool to issue this query:

```
SELECT
*
FROM PSPRCRQST
WHERE PRCSNAME = 'FE_FORM_PUR'
AND RUNSTATUS = 5
```

If no such process is scheduled to run, you must schedule it. Use the following steps to schedule a process.

1. Select Design Student Administration, Forms Engine, Process, Form Data Purge.
2. Create a run control.
3. Click the Run button.
4. Set the server name.
5. Set the Recurrence value to a daily purge schedule. If you do not have a recurrence, create a new one by selecting PeopleTools, Process Scheduler Manager, Use, Recurrence Definitions to create a new one.

6. Click OK.

Modifying a Form

You can modify a form in two ways. You should use the Application Designer. You can also edit the form with the Form Editor. If you modify the form by modifying the related page in the Application Designer (AD), click the Import Page button to import the modified page to the Form Editor.

In the AD, page fields are not tied to record fields, and the page size matches the paper size in units of ENs. 72 ENs are in an inch. If you want to lay out a page in landscape format, you must change the page size so that the width is larger than the length. An 8 ½ by 11 inch piece of paper in portrait layout has the page size of 612 wide by 792 tall. To view or set this, access page properties and select the Use tab.

Currently, no recurring fields are permitted by the Forms Engine. Instead, each field on the page must have a unique name. View or set the PAGEFIELDNAME in the field properties and select the General tab. To see all of the PAGEFIELDNAMES on a page, select the Order tab in AD for the page. You can rearrange, hide, or delete page fields. However, you cannot move fields to a different page or add new fields without changing the application program.

Adding Data to the Form Data Tables

To change the application program, you need to understand the nature of the various tables that store the form data. A computer programmer typically performs the following application program steps.

1. Obtain the next available FORM_PROC_INST by incrementing the field LAST_FORM_PROCIINST in table PS_INSTALLATION_FA.
2. Insert one row into the PS_FORM_INSTANCES table corresponding to a single batch of output to be collated into one output stream.
3. Insert multiple rows into the PS_FORM_COLLATEGRP table, one per unique value of the FORM_GROUP_SEQ field.

This is the description of the FORM_GROUP_SEQ field from its property in AD: *Form Group Sequence enables the sequencing of form groups within a FORM_PROC_INST. Each time a group of forms begins to print, this value is incremented and stays the same within that form group. If the same form group prints again, it is incremented again, so that it is not the same value if the same form group prints twice.*

4. Insert multiple rows into the PS_FORM_DATA table, one per data value.

If the length of the data value exceeds 40 characters, you must also insert a related row into one of these tables: PS_FORM_DATA_C128, PS_FORM_DATA_C254, or PS_FORM_DATA_LONG. Set the value of the FORM_FIELD_LTYPE accordingly. Set the appropriate value for the FORM_GROUP_SUB_SEQ field. This is the description of that field from its property in AD: *Form Group Sub Sequence is a sequence number within a form group, one per form. When a new form group begins to print, this sequence number starts back at one.*

Setting Up Images

An image must exist in the Form Image Text table. You can use a Adobe PostScript rendering utility to generate a related bitmap or JPG file. Some examples of utilities that you can use are Ghostscript® or Adobe® Distiller.

This section discusses how to:

- Set up a background image.
- Set up a foreground image.

See <http://www.ghostscript.com>.

See <http://www.adobe.com>.

Setting Up a Background Image

If you want to use Application Designer to modify the background image, you must create a modified style sheet and set the background image there. Refer to the Application Designer User Guide for details.

If you want to use the Form Editor to modify the background image, enter the image name in the Image field located to the right of the Background Color group box on the Form Editor page. The name that you enter here must be one of the names in the Form Image Text table.

Setting Up a Foreground Image

If you want to use Application Designer to add, modify, or create a foreground image, you must first create an image object, which you subsequently place on your page. Follow these steps if you want to use the Form Editor to modify or create a foreground image.

1. Insert a row into the list of form field objects.
2. Set form field type to *Image*.
3. Click the Edit Field Attributes link.
4. Set the image name, position, and scaling factor.
5. Click OK.

Changing a Logo

You can convert an image (for example, the Financial Aid PeopleSoft Univ Logo FAPSULGO) to encapsulated PostScript (eps) format suitable for use by the Forms Engine. To upload your image in eps format, you must first convert your logo from jpeg format to eps format. You must also convert your jpeg to gif format to view it in Application Designer. You must use the same naming convention for all three formats. The only change to the file name is the format extension (for example, Univ_Logo.jpg/Univ_Logo.eps/Univ_Logo.gif).

Note. If you are converting an image other than FAPSULGO, use that name in place of FAPSULGO.

You may want to consult your technical support group before implementing this procedure.

To change FAPSULGO:

Phase 1 – Converting the Application Designer Image to EPS Format

Perform the following 26 steps before proceeding with Phase 2.

1. Install Microsoft Photo Editor, GhostScript (<http://www.ghostscript.com>) and GsView, and JPEG2PS Utility (<http://umn.dl.sourceforge.net/sourceforge/gnuwin32/jpeg2ps-1.9-bin.zip>).
2. In Application Designer, open image FAPSULGO.

- To add a new image:

When prompted to select the image, select the gif. (for example, FAPSULGO.gif). The system displays the message, *Image format cannot be displayed in Windows. Do you want to import an alternate image?*

Click Yes and then select the .jpg (for example, FAPSULGO.jpg).

Right click and select image properties.

Enter a description. On the Use tab, omit the Image URL.

Click OK and save.

- To export an existing image:

Click File, Export Image.

Save it to a temporary location (for example, c:\temp\FAPSULGO.GIF) in GIF format.

- Close Application Designer.
3. Use Microsoft Photo Editor to convert the GIF to JPG format. Double-click the GIF file in Windows Explorer to invoke Photo Editor and open this file. Select File, Save As and select Jpeg format. Use the MORE button to reduce the size of the jpg file. Alternatively, you can override the scaling factor in step 13 to avoid losing image resolution.
 4. Reopen the jpg file in Photo Editor to confirm that you like the way it looks in jpg format and then close Photo Editor.

5. If you are using the jpeg2ps utility, issue the command `jpeg2ps FAPSULGO.jpg > FAPSULGO.eps`.
6. Edit FAPSULGO.eps in Notepad.
7. Save the file as FAPSULGO.ps. Note. It is '.ps', not '.eps'.
8. Remove the comments at the start of the file that start with '% '.
9. Remove the language level test and the 'save' line.
10. At this point, all of the lines prior to the /RawData ... line have been deleted. The first line of the file now starts with /RawData.
11. Remove the 'showpage' line.
12. Remove the 'restore' line.
13. Change the 'scale' line to specify the width (65) and height (54) of the image (for example, 65 54 scale). The width and height can be seen in the image attributes three lines down. You can override the scaling factors here to resize your image without losing resolution.
14. Change the 'translate' to locate the image on the page. A page of 8.5 by 11 inches would have the dimensions in Ens' of 612 by 792 (multiply inches by 72). For example, to place the image 1/2 inch from the top and 1/2 inch from the left, change the translate line to 36 702 translate. The $702 = 792 - 36 - 54$ (image height).
15. Insert this comment line after the 'scale' line: `% /BBox [0 0 1 1] def`.
16. Although this file does not need a /BBox statement, the Form Editor looks for a /BBox statement when it is importing a page's image.
17. Add a 'showpage' line at the end of the file.
18. File FAPSULGO.ps.
19. Display FAPSULGO.ps using Ghostview. Verify that this looks like what you want.
20. Print FAPSULGO.ps by copying it to your printer from a command line: `copy FAPSULGO.ps \\prtserver\prntername`.
21. Confirm that the output looks good.
22. Using Notepad, edit FAPSULGO.ps. Save it as FAPSULGO.eps (note it is '.eps', not '.ps').
23. Remove the 'showpage' at the end of the file.
24. Comment out the scale and translate lines near the top of the file by inserting a '%' at the front of each of those lines.
25. Add a comment at the very top of the file starting with a '%' describing this image. for example, `% PeopleSoft Logo Icon`.
26. File FAPSULGO.eps.

Phase 2 – Uploading and Editing Form Image Text

Perform steps 1 through 6 before proceeding with Phase 3.

1. Upload FAPSULGO.eps into the form image text FAPSULGO:
 - Select Design Student Administration, Forms Engine, Process, Upload EPS Image File.
 - URL: ftp.myserver.com
 - File Transfer ID: ftpid
 - Operator Password: ftppw
 - Unique System Filename: FAPSULGO.eps
 - Remote File Name: FAPSULGO.eps
 - Form Image Name: FAPSULGO
 - Submit
2. Edit the eps image file settings. For example, select Design Student Administration, Forms Engine, Setup, Form Image Text.
3. Open FAPSULGO.
4. For the description, enter the description of the image. For example: PeopleSoft Logo Icon.
5. Do not enable the Cache Form On Printer check box.
6. Save.

Phase 3 – Using Application Designer to Establish Field Properties and Create a New Image

Perform the following 17 steps.

1. Open Application Designer.
2. Open the page FA_AWD_NOTIF_LTR1 in Application Designer.
 - In the page field properties, change the existing image to the image that you just created.
 - In the Image/Format Size section, set the width and the height. See Step 13 in Phase 1 for values.
 - Click OK and save your changes.
3. Right-click the image on the page.
4. Select Page Field Properties.
5. Select the image ID FAPSULGO.
6. Select the 'Size' option on the image.
7. Set the width to 65 and the height to 54. Refer to Step 13 in Phase 1.
8. Click OK.
9. The image on the page in Application Designer should now show the new logo.
10. Save the page.

11. Click OK to all the prompts for *Warning: Page field with label "not related to database field"*. You can hold down the Enter key and let it auto-repeat the enter.
12. Close Application Designer.
13. Access Form Editor. Select Design Student Administration, Forms Engine, Setup, Form Editor.
14. Open the form FA_AWD_NOTIF_LTR1.
15. Click the Import Page button.
16. Click the Preview link. This automatically saves the form with the newly imported page values.
17. If the icon looks good here, you are ready to test.

Chapter 48

(CAN) Using Canadian Financial Aid Applications and Canadian Need Analysis

This chapter provides an overview of Canadian Need Analysis System (CNAS) and discusses how to:

- Define the CNAS file load parameters.
- Load and view CNAS data.
- Manage CNAS suspense.
- Add an application source code for Canadian applications.
- Maintain full-time student data.
- Maintain part-time student data.
- Review CNAS calculation results.
- View audits.
- Insert an ISIR row.

Understanding CNAS

CNAS application allows entry of full-time or part-time Canadian student loan applications. You invoke calculation routines from the application pages and can view the results online. Auditing is available for all fields on the application pages. The system stores calculation results in effective-dated tables.

Defining the CNAS File Load Parameters

This section discusses how to define data load parameters.

Page Used to Define the CNAS File Load Parameters

Page Name	Definition Name	Navigation	Usage
File Load Setup	CSL_CONTROL	Set Up SACR, Product Related, Financial Aid, File Management, CSL File Load Control, File Load Setup	Define the parameters of the file load.

Defining Data Load Parameters

Access the File Load Setup page (Set Up SACR, Product Related, Financial Aid, File Management, CSL File Load Control, File Load Setup).

File Load Setup

Academic Institution: PSUNV PeopleSoft University


Aid Year: 2005 Financial Aid Year 2004-2005


***Input/Output file:**


Error file:


Match


- ☒ Name
- ☒ ID
- ☒ SIN

Record Add Level:  Load Everyone

Record Suspend Level:  Load Everyone

CSL Numeric Variable: 

Prov Loan Numeric Variable: 

CSG Numeric Variable: 

File Load Setup page

Input/Output file Enter the file path and file name of the input/output file that you want to load.

Error file Enter the file path and file name for the error file.

Name ID and SIN (social insurance number) Select a check box to indicate which criteria to use in matching incoming student records to existing records in the database.

Record Add Level and
Record Suspend Level

Indicates the admit level required to add a student record to the database or place it in suspense. The values are as follows:

- 0: Load Everyone
- 1: Recruits or Higher
- 2: Inactive Admits or Higher
- 3: Applicants or Higher
- 4: Active Admits or Higher
- 5: Accepted/Continuing Only

Student records meeting criteria below the suspense admit level are not loaded from the OSAP file.

CSL Numeric Variable
(Canada student loan
numeric variable), **Prov
Loan Numeric Variable**
(province loan numeric
variable), and **CSG
Numeric Variable**
(Canada study grant
numeric variable)

Select a value. Variables enable the system to assign load data to numeric packaging variable fields.

Note. Verify that the variable chosen is not already in use. This process overwrites any existing data in the chosen numeric packaging variable fields.

Loading and Viewing CNAS Data

This section discusses how to:

- Load CNAS data.
- View CNAS Load Results 1.
- View CNAS Load Results 2.

Pages Used to Load and View CNAS Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Data Load	RUNCTL_OSAP	Financial Aid, File Management, Canadian, Process Data Load, Data Load	Load eligibility data from the provincial Student Services Bureau into the system.
Load Results 1	OSAP_RESULTS1	Financial Aid, File Management, Canadian, View Load Results, Load Results 1	View data load record layout results, in the format of the new or previous version, that are successfully loaded to your database.

Page Name	Definition Name	Navigation	Usage
Load Results 2	OSAP_RESULTS2	Financial Aid, File Management, Canadian, View Load Results, Load Results 2	View new version data load record layout results successfully loaded to your database.

Loading CNAS Data

Access the Data Load page (Financial Aid, File Management, Canadian, Process Data Load, Data Load).

Data Load

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

'Academic Institution: PSUNV PeopleSoft University

'Aid Year: 2009 Financial Aid Year 2008 - 2009

Data Load page

Academic Institution Select the institution to populate the load data.

Aid Year Select to process the data load.

Click the Run button to run the process.

On the Process Scheduler Request page, select *New OSAP Data Load* (FAOSPLDN) to load files supported by the new record layout. If you select and run the *Old OSAP Data Load*, your process and results display in the format of the previous version.

Viewing CNAS Load Results 1

The Load Results 1 page contains the data load results for either format of the record layout for applications received by the Ministry of Training, Colleges and Universities.

Access the Load Results 1 page (Financial Aid, File Management, Canadian, View Load Results, Load Results 1).

Load Results 1		Load Results 2	
Edward Churchill		ID: FA0456	SIN: 680-989-976
Aid Year: 2007	Institution: PSUNV	Last Transaction Date: 06/01/2006	
<div>Load Results</div> <div>Find View All First 1 of 1 Last</div>			
App Acct Nbr: 001276021			
Total Entitled Award:	4,556	Grant Issued:	0
CSL Amount:	2,734	Date Received at SSB:	06/01/2006
OSL Amount:	1,822	Highest Percentage Courseload:	60
CSG Amount:	0	Total Need:	4,556
Total OSL Issued:	619	Total Need Flag:	X
Total CSL Issued:	3,937	Current Cost Code:	FDES
Multiple Apps:	NE Code: D1	Academic Year:	0607
Preprint Indicator: N	Year Entering: 1	School Code:	EUAX
Status Codes			
Status 1: 3	Status 5: 5	Status 9:	Status 13:
Status 2: 5	Status 6:	Status 10:	Status 14:
Status 3: 5	Status 7:	Status 11:	Status 15:
Status 4: 6	Status 8:	Status 12:	

Load Results 1 page

The system displays the student name, ID, SIN (social insurance number), Aid Year, Institution, and Last Transaction Date.

App Account Nbr (application account number) The number assigned to the application. A student can have multiple application rows.

Total Entitled Award Displays the student's total award amount.

CSL Amount(Canada student loan amount) Displays the loan amount from CSL.

OSL Amount (Ontario student loan amount) Displays the loan amount from OSL.

CSG Amount(Canada study grant amount) Displays the grant amount from CSG.

Total OSL Issued (total Ontario student loan issued) Displays the amount issued to the student from OSL.

Total CSL Issued (total Canada student loan issued)	Displays the amount issued to the student from CSL.
Grant Issued	Displays the grant amount issued.
Date Received at SSB (date received at student support branch)	Displays the date received at SSB.
Highest Percentage Courseload	Displays the course load percentage.
Total Need	Displays the amount of the student's total financial aid need.
Total Need Flag	Displays the total need flag.
Current Cost Code	Displays the current cost code. Cost code is based on the number of weeks of financial aid and the student's career, program, and year in school.
Multiple Apps (multiple applications)	Indicates multiple applications.
Preprint Indicator	Indicates preprint.
NE Code	Displays the NE code.
Year Entering	Displays the year that the student is entering the program. For example if the student is entering second year, this field displays a 2.
Academic Year	Displays the academic year.
School Code	Displays the school code.

In the Status Codes group box, the system displays any applicable status codes.

Viewing CNAS Load Results 2

The Load Results 2 page contains the data load results using the new record layout for applications received by the Ministry of Training, Colleges and Universities.

Access the Load Results 2 page (Financial Aid, File Management, Canadian, View Load Results, Load Results 2).

Load Results 1		Load Results 2	
Edward Churchill		ID: FA0456	SIN: 680-989-976
Aid Year: 2007	Institution: PSUNV	Last Transaction Date: 06/01/2006	
Load Results Find View All First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last			
App Acct Nbr: 001276021			
Unmet Need:	0	Disability Flag:	No
OAG Entitled:	0	OAG Issued:	0
MOAG Entitled:	0	MOAG Issued:	0
CAG LID Entitled:	0	CAG LID Issued:	0
CAG PD Entitled:	0	CAG PD Issued:	0
Millennium Entitled:	0	Millennium Issued:	0
Current Status Information:	6	Own Vehicles?:	2
RRSP Net Value:	0	Total Other Assets:	0
Student Prestudy Income:	5500	Study Period Employment:	0
Gov't Income:	0	Type of Gov. Income:	
Living w/Parent:	Live Away	Residency Info:	Student ON
C of E Event Status:	E	Code 35:	Yes
Code 65:	Yes	Code 67:	Yes

Load Results 2 page

Managing CNAS Suspense

This section discusses how to:

- Review CNAS suspense.
- Process CNAS suspense.

Pages Used to Manage CNAS Suspense

Page Name	Definition Name	Navigation	Usage
Suspense Management	FA_OSAP_SUSP	Financial Aid, File Management, Canadian, Manage Suspended Records, Suspense Management	Manage the applications that did not to load during an incoming application process.

Page Name	Definition Name	Navigation	Usage
Suspense Maintenance	RUNCTL_SUSP	Financial Aid, File Management, Canadian, Process Suspense Files, Suspense Maintenance	Move records that have been marked as add, pending or delete on the Suspense Management page.

Reviewing CNAS Suspense

Access the Suspense Management page (Financial Aid, File Management, Canadian, Manage Suspended Records, Suspense Management).

Suspense Management

Academic Institution: PSUNV **Aid Year:** 2005
FA Student ID: 00000015 DELEERSNYDER GREGORY D
Last Transaction Date: 07/26/2004

Find | View All First ◀ 1 of 1 ▶ Last

Application Account Number: 001342532 Social Insurance Number: 492-523-384 Date of Birth: 12/16/1971 Student's Admit Level: 3 - Applied/Pending OSAP Suspend Reason: EmplID not matched ID: <input type="text" value="00000015"/>	<div>Action</div> <p> <input type="radio"/> Add to Results <input checked="" type="radio"/> Pending <input type="radio"/> Delete from Suspense </p>
--	---

Suspense Management page

Academic Institution Indicates the institution for data that you want to maintain.

Aid Year An awarding cycle with defined disbursement periods.

FA Student ID Displays the student's unique identification.

Last Transaction Date Displays the date of the last transaction.

Application Account Number Displays the application account number.

Social Insurance Number Displays the social insurance number.

Date of Birth Displays the student's date of birth.

Student's Admit Level	Displays admission level. Values are: <i>0 - Student Not Found, 1 - Has Not Applied, 2 - Inactive, 3 - Applied/Pending, 4 - Admitted, and 5 - Accepted/Continuing.</i>
OSAP Suspend Reason (Ontario Student Assistance Program suspend reason)	Displays reason for suspense. Values are: <i>EmplID not matched, SIN not matched, Name not matched, EmplID/SIN not matched, EmplID/Name not matched, SIN/Name not matched, EmplID/SIN/Name not matched, and Student not at load level.</i>
ID	Enter the student's unique identification.
Add to Results	Select to move the student's record from suspense to the load results table.
Pending	Select to keep the student's record in suspense. For example, if your institution only loads admitted students and you know that a student is not yet admitted, you would select Pending to keep the student in suspense.
Delete from Suspense	Select to move the student from suspense.

Processing CNAS Suspense

Access the Suspense Maintenance page (Financial Aid, File Management, Canadian, Process Suspense Files, Suspense Maintenance).

Suspense Maintenance

Run Control ID: CNAS_SUSPENSE [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSUNV PeopleSoft University

*Aid Year: 2005 Financial Aid Year 2004-2005

Suspense Maintenance page

Academic Institution Select the institution for the suspense data you want to move.

Aid Year Select the aid year for the suspense data you want to move.

Click the Run button to run the process.

For Financial Aid Year 2005-2006 and forward, two formats are available for the data load.

On the Process Scheduler Request page, select *New OSAP Suspense Processing* (FAOSPSPN) to process files supported by the new record layout. If you select and run the *Old OSAP Suspense Processing*, your process and results display in the previous format.

Adding an Application Source Code for Canadian Applications

This section discusses how to add an application source code.

Page Used to Add an Application Source Code

Page Name	Definition Name	Navigation	Usage
Add Institutional Application	INST_ADD	Financial Aid, Canadian Application Data, Add Institutional Application, Add Institutional Application	Add or view the application source code for a student's full-time or part-time Canadian application.

Adding an Application Source Code

Access the Add Institutional Application page (Financial Aid, Canadian Application Data, Add Institutional Application, Add Institutional Application).

Add Institutional Application page

Application Source Code

Select one or more of the options to associate this type of application with the student. The verification process uses the application source code.

0: Need Access

8: Profile

9: Institutional Application

O: FT Canada Student Loan (full time)

P: PT Canada Student Loan (part time)

Note. Part-time applications must have an Application Source Code of *P* (part-time) for correct CNAS calculation.

Maintaining Full-Time Student Data

Different Canadian financial aid applications are available for full-time and part-time students. Use the Full-time Application component to enter and maintain data for full-time students.

This section lists common elements and discusses how to:

- Enter student personal information.
- Override institutional CNAS options.
- Enter student family status and residency information.
- Enter student study period information.
- Enter student financial data.
- Enter parent data.
- Enter spouse information.
- Enter signature and next of kin information.

Common Elements Used in This Section

Student Extensions

Click to access the Student Extensions Page where you can override the institutional CNAS setup options for the student.

CNAS Calc (Canadian Need Analysis System calculation)

Click to calculate an unofficial federal and institutional family contribution and award amounts using CNAS. RFC invokes a COBOL function to perform the CNAS calculation.

Pages Used to Maintain Full-Time Student Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Personal Info	INST_STDNT_CSL_A	Financial Aid, Canadian Application Data, Create/Update FT Application, Student Personal Info	Enter and view demographic and school data for a student's full-time Canadian application.
Student Extensions	STDNT_CNAS_EXT_SBP	Click the Student Extensions button on the Student Personal Info page.	Override institutional level options.

Page Name	Definition Name	Navigation	Usage
Student Current Stat/Residency	INST_STDNT_CSL_BC	Financial Aid, Canadian Application Data, Create/Update FT Application, Student Current Stat/Residency	Enter or view a student's family and residency information.
Student Study Pd Info (student study period information)	INST_STDNT_CSL_D	Financial Aid, Canadian Application Data, Create/Update FT Application, Student Study Pd Info	Enter or view data regarding the academic program in which the student is enrolled for the study period.
Student Financial Data	INST_STDNT_CSL_E	Financial Aid, Canadian Application Data, Create/Update FT Application, Student Financial Data	Enter or view a student's pre-study and study period financial data.
Parent Data	INST_PARENT_CSL_J	Financial Aid, Canadian Application Data, Create/Update FT Application, Parent Data	Enter or view information about a parent's family status, income, and taxes.
Spouse Info	INST_STDNT_CSL_K	Financial Aid, Canadian Application Data, Create/Update FT Application, Spouse Info	Enter or view spouse information.
Signature / Next of Kin	INST_STDNT_CSL_M	Financial Aid, Canadian Application Data, Create/Update FT Application, Signature/Next of Kin	Enter or view family and signature information.

Entering Student Personal Information

Access the Student Personal Info page (Financial Aid, Canadian Application Data, Create/Update FT Application, Student Personal Info).

Student Personal Info		Student Current Stat/Residency		Student Study Pd Info	
Fatana Abarta		ID:		FA0001	
Aid Year:	2005	Source:	FT CSL	NID:	099707878
		Institution:	PSUNV	Student Extensions CNAS Calc	
Date of Birth:	04/15/1980	CNAS Application Date:	10/30/2004		
Preferred Language:		Disabled:		CSL Citizenship:	N
Last High School Date:	06/01/1997	Years Out of High School:	7	Gender:	Unknown
<input checked="" type="checkbox"/> Prior Postsecondary Studies		Prior Postsecondary Date:		12/08/2000	
<input type="checkbox"/> Prior Canadian Student Loan					
<input type="checkbox"/> Defaulted Loan					
<div>Find View All First 1 of 1 Last</div>					
Driver's License Number:		019703878			

Student Personal Info page

Date of Birth	Displays the student's date of birth.
CNAS Application Date (Canadian Need Analysis System application date)	Select the date that the CNAS application was filed.
Preferred Language	Displays the preferred language for the student.
Disabled	Displays whether the student is disabled.
CSL Citizenship	Displays whether CSL citizenship is established.
Last High School Date	Displays the date that the student last attended high school.
Years Out of High School	Displays the number of years the student has been out of high school.
Gender	Displays the student's gender.
Prior Postsecondary Studies	Select to indicate that the student has prior postsecondary studies.
Prior Postsecondary Date	Enter the date the student was last studying at the postsecondary level.
Prior Canadian Student Loan	Select to indicate that the student received a Canadian student loan in the past.
Defaulted Loan	Select to indicate that the student defaulted on a Canadian student loan.
Driver's License Number	Displays the student's driver's license number.

Overriding Institutional CNAS Options

Access the Student Extensions page (click the Student Extensions button on the Student Personal Info page).

Student Extensions

Find | View All First 1 of 1 Last

*CNAS Rule Set: CSL Status: Active CSL-OSL: C CSL

Enrollment Override: Full-Time

Car Allowance Override:

Override Standard Category:

Asset Allowance Override:

Prestudy Weeks Override:

☐ Spouse Disabled

Prestudy Housing Override:

FM/IM Use: B Both FM and IM EFC

Use Cost of Attendance: F Fed Year COA

Award Period Use: A Academic

Student Extensions page

The values on this page override institutional level options.

Note. Although many options can be entered and calculated, there might be only one value used to update federal need and family contribution (FC) values and only one value used to update institutional need and FC values. The most recent option entered is used in the calculation.

CNAS Rule Set (Canadian Need Analysis System rule set)	Select the CNAS Rule Set to use for this student. Select <i>OSL</i> or <i>CSL</i> .
Status	Select the effective status of the extension. Values include <i>Active</i> and <i>Inactive</i> . Only active extensions are processed.
CSL-OSL	Select the type of calculation to perform. <i>O – OSL:</i> Invokes OSAP special rules for parent tax table use and parental contribution calculations. <i>C – CSL:</i> Invokes Canadian rules for parent tax table use and parental contribution calculations.
Enrollment Override	Optionally select a value to override enrollment values for federal or institutional need calculation. Values are: <i>Full-Time</i> or <i>Part-Time</i> .

Override Standard Category	<p>Optionally select a value to override standard category values for federal or institutional need calculation. Values are:</p> <p><i>Married</i>: Indicates the student is married.</p> <p><i>Sng Dep</i>: Indicates the student is single and a dependent.</p> <p><i>Sng Ind</i>: Indicates the student is single and independent.</p> <p><i>Sole Supp</i>: Indicates the student is the sole supporter of the household.</p>
Prestudy Weeks Override	Optionally enter a value to override prestudy weeks values for federal or institutional need calculation.
Prestudy Housing Override	Optionally select a value to override prestudy housing values for federal or institutional need calculation. Values are <i>O – Other</i> or <i>P – Parents</i> .
Car Allowance Override	Enter a dollar amount to override car allowance values for federal or institutional need calculation.
Asset Allowance Override	Enter a dollar amount to override asset allowance values for federal or institutional need calculation.
Spouse Disabled	Select to indicate that the student's spouse is disabled and to override the values for federal or institutional need calculation.
FM/IM Use	<p>Select one of the following:</p> <p><i>F – FM EFC</i>: Use to calculate family contributions and to store information in federal methodology fields in Financial Aid.</p> <p><i>I – IM EFC</i>: Use to calculate family contributions and to store information in institutional methodology fields.</p> <p><i>B – Both FM and IM</i>: Use to store information in both FM and IM fields.</p>
Use Cost of Attendance	Indicates whether <i>F – fed year coa</i> (federal year cost of attendance) or <i>I – inst year coa</i> (institutional year cost of attendance) is used in calculation of need.
Award Period Use	Indicates whether <i>A – Academic</i> , <i>B – Both</i> , or <i>N – Nonstandard</i> award periods are updated with calculation results.

Entering Student Family Status and Residency Information

Access the Student Current Stat/Residency page (Financial Aid, Canadian Application Data, Create/Update FT Application, Student Current Stat/Residency).

Student Personal Info		Student Current Stat/Residency		Student Study Pd Info	
Fatana Abarta		ID:	FA0001		
Aid Year:	2005	Source:	FT CSL	NID:	099707878
		Institution:	PSUNV		
		Student Extensions		CNAS Calc	
Marital Status:		Single		Marital Status Date:	<input type="text"/> 31
<input type="checkbox"/> Dependents Other Than Spouse		<input type="checkbox"/> Orphan or Ward of the Court		<input type="checkbox"/> In Workforce	
*Student's Residence:	<input type="text"/> ON	Student's Residence Length:	<input type="text"/> 2	At least 12 Months	
Spouse's Residence:	<input type="text"/>	Spouse's Residence Length:	<input type="text"/>		
Parent Residence:	<input type="text"/>	Parent Residence Length:	<input type="text"/>		
Dependents 11 and Under:	<input type="text"/> 0	Child Care Costs:	<input type="text"/> 0		
Dependents 12 to 18:	<input type="text"/> 0				
Dependents 19 and Older:	<input type="text"/> 0				

Student Current Stat/Residency page

Marital Status Displays the student's marital status.

Marital Status Date If not single, select the date of the marriage.

Dependants Other Than Spouse Select if the student has dependents other than a spouse.

Orphan or Ward of the Court Select if the student is an orphan or a ward of the court.

In Workforce Select if the student is in the workforce.

Student's Residence Select the province in which the student lives.

Student's Residence Length Select the length of time student has lived in the province. Values are:

1: less than 12 months.

2: at least 12 months.

Spouse's Residence Select the province in which the student's spouse lives.

Spouse's Residence Length Select the length of time the student's spouse has lived in the selected province from the following options:

1: less than 12 months.

2: at least 12 months.

Parent Residence Select the province in which the student's parent lives.

Parent Residence Length	Select the length of time the student's parent has lived in the selected province from the following: 1: less than 12 months. 2: at least 12 months.
Dependents 11 and Under	Enter the number of dependents aged eleven or younger.
Dependents 12 to 18	Enter the number of dependents aged twelve to eighteen.
Dependents 19 and Older	Enter the number of dependents aged nineteen or older.
Child Care Costs	Enter a dollar amount if the student pays child care costs.

Entering Student Study Period Information

Access the Student Study Pd Info page (Financial Aid, Canadian Application Data, Create/Update FT Application, Student Study Pd Info).

Student Personal Info	Student Current Stat/Residency	Student Study Pd Info
Fatana Abarta		ID: FA0001
Aid Year: 2005	Source: FT CSL	NID: 099707878 Institution: PSUNV Student Extensions CNAS Calc
Anticipated Academic Program: <input type="text"/>		
Study Period Start Date: <input type="text"/>	Degree/Certificate: <input type="text"/>	
Study Period End Date: <input type="text"/>	Year in Program: <input type="text" value="2"/>	
*Course Load Percentage: <input type="text" value="100.00"/>	Total Program Years: <input type="text" value="4"/>	
<input type="checkbox"/> Cooperative Education Program	Study Period Housing: <input type="text" value="0"/> Other	
<input type="checkbox"/> Correspondence/Distance Educ	Travel Home Cost: <input type="text" value="0"/>	
<input type="checkbox"/> Merit Scholarship Recipient		
Fed Year Cost of Attendance: <input type="text" value="15,134.00"/>	Number of Terms: <input type="text" value="2"/>	FA Number of Weeks: <input type="text" value="33"/>
Inst Year Cost of Attendance: <input type="text" value="15,134.00"/>	Tuition Component: <input type="text" value="0"/>	Regulated Program: <input type="text"/>

Student Study Pd Info page

Data in many of the fields on this page default from setup tables and from FA Term data. You can overwrite the default data on this page.

Anticipated Academic Program Select an academic program in which the student plans to enroll.

Study Period Start Date and Study Period End Date	Enter the dates on which the study period begins and ends.
Course Load Percentage	Enter the percentage of a full-time course load in which the student is enrolled. For example, if the student is enrolled half-time, enter <i>50.00</i> .
Cooperative Education Program	Select if the student is enrolled in a co-op program.
Correspondence/Distance Education (correspondence/distance education)	Select if the student is enrolled in a correspondence or distance education program.
Merit Scholarship Recipient	Select if the student is receiving a merit scholarship.
Degree/Certificate	Select the degree or certificate that the student is working toward at the institution. Values are: 1: Diploma 2: Certificate 3: Bachelor's Degree 4: Master's Degree 5: Doctoral Degree
Year in Program	Enter the year of the program in which the student is currently enrolled.
Total Program Years	Enter the total number of years that it takes to complete the program.
Study Period Housing	Select a value to indicate whether a student is living with parents (<i>P – parents</i>) or living elsewhere (<i>O – Other</i>).
Travel Home Cost	Enter an amount allowed for a student to travel home from school during the study period.
Fed Year Cost of Attendance (federal year cost of attendance)	Enter the federal methodology amount for a yearly cost of attendance.
Inst Year Cost of Attendance (institutional year cost of attendance)	Enter the institutional methodology amount for a yearly cost of attendance.
Number of Terms	Enter the number of terms for use in the resource calculation for Additional Cost Recovery, which is a deregulated program.
Tuition Component	Enter tuition and fees data to be used by the Additional Cost Recovery program.
FA Number of Weeks	Enter the number of weeks that are considered part of the study period for financial aid purposes.

Regulated Program

Indicate whether a program is regulated (*R – Regulated Program*) or non-regulated (*N – Non-Regulated Program*) based on criteria from the Ministry of Education and Training.

Entering Student Financial Data

Access the Student Financial Data page (Financial Aid, Canadian Application Data, Create/Update FT Application, Student Financial Data).

Student Study Pd InfoStudent Financial DataParent DataSpouse Info

Fatana AbartaID: FA0001

Aid Year: 2005Source: FT CSLNID: 099707878Institution: PSUNVStudent ExtensionsCNAS Calc

Prestudy

Income: 0Income Source: Prestudy Housing: 0OtherBankruptcy

Study Period

Gross Income: 400Other Income: 0S/B/A Income: 3,000Income Source: 1Employment Insurance

Assets

Vehicle Make 1:Vehicle Model 1:Vehicle Make 2:Vehicle Model 2:Retirement Savings Value: 6,187Vehicle Year 1:Vehicle Value 1: 0Vehicle Year 2:Vehicle Value 2: 0Investment Value: 300

Student Financial Data page

Prestudy

Income

Enter the student's pre-study income amount.

Income Source

Select from the following values:
1: Ontario Disability Pgm
2: Family Benefits
3: General Welfare
4: Other

Prestudy Housing	Select from the following values: <i>O</i> : Other <i>P</i> : With Parents
Bankruptcy	Select if the student has declared bankruptcy in the past.
Study Period	
Gross Income	Enter an amount for the student's gross income during the study period.
Other Income	Enter an amount for any other income the student receives during the study period.
S/B/A Income (scholarship, bursary, and award income)	Enter the gross income recorded on the student assistance application for income from scholarships, bursaries and awards the student is to receive during the study period.
Income Source	Select a source of income received during the study period from the following: 1: Employment Insurance 2: Loss of Earnings Benefits 3: Extended Care & Maint Alwnc (maintenance allowance) 4: Ontario Disability Support Pgm (program) 5: Ontario Works 6: Family Benefits 7: Natv Post-Sec Stu Sup Pgm (Native Post-secondary Student Support Program) 8: Canada Pension Plan 9: Other
Assets	
Vehicle Make 1and Vehicle Make 2	Enter the makes of the cars that the student owns.
Vehicle Model 1and Vehicle Model 2	Enter the models of the cars that the student owns.
Vehicle Year 1and 2	Enter the years of the cars the student owns.
Vehicle Value 1and Vehicle Year 2	Enter the values of the cars that the student owns.
Retirement Savings Value	Enter the student's retirement savings amount.
Investment Value	Enter the student's investment value amount.

Entering Parent Data

Access the Parent Data page (Financial Aid, Canadian Application Data, Create/Update FT Application, Parent Data).

Student Study Pd InfoStudent Financial DataParent DataSpouse Info

Fatana AbartaID: FA0001

Aid Year: 2005Source: FT CSLNID: 099707878Institution: PSUNVStudent ExtensionsCNAS Calc

Marital Status:Dependents: 0Number in College: 0

Father's Information

Father's Social Insurance #:Father has No IDFather Actual Income: 0Expected Father's Earnings: 0Father's Pension: 0Father's Empl Ins Premium: 0Father's Tax Paid: 0

Mother's Information

Mother's Social Insurance #:Mother has No IDMother Actual Income: 0Expected Mother's Earnings: 0Mother's Pension: 0Mother's Empl Ins Premium: 0Mother's Tax Paid: 0

Parent Income Source:

Parent Data page

- Marital Status

Select from: *C – Common-law, D – Divorced, E – Separated, H – Head of Household, M – Married, S – Single, U – Unknown, and W – Widowed.*
- Dependents

Enter the number of dependents that the parents have.
- Number in College

Enter the number of people in college in the parent's household.
- Father's Information

Father's Social Insurance #

Enter the father's social insurance number.

Father Has No ID

Select this check box if the father has no social insurance number.

Father Actual Income and Expected Father's Earnings

Enter an amount for either the father's actual income or the father's expected earnings.

Father's Pension

Enter an amount for the father's pension if he receives one.

Father's Empl Ins Premium (father's employment insurance premium) Enter an amount of employment insurance for the father.

Father's Tax Paid Enter the amount of tax that the father paid.

Mother's Information

The fields in the Mother's Information group box are the same as those in the Father's Information group box.

Parent Income Source Select the parent's income source from the following:

- 1: Ontario Disability Program
- 2: Family Benefits
- 3: General Welfare
- 4: Other

Entering Spouse Information

Access the Spouse Info page (Financial Aid, Canadian Application Data, Create/Update FT Application, Spouse Info).

Student Study Pd Info Student Financial Data Parent Data **Spouse Info**

Fatana Abarta ID: FA0001

Aid Year: 2005 Source: FT CSL NID: 099707878 Institution: PSUNV [Student Extensions](#) **CNAS Calc**

Spouse:

Spouse's Occupation:

☐ Living in Canada ☐ Spouse Full-Time Courseload ☐ Spouse in 12 Week Program

Spouse Institution:

Spouse Last High School Date:

Spouse Gross Income: 0

Spouse Income Source:

[Transfer to Relationships Page](#)

Spouse Info page

Spouse Select the student's spouse. The student's spouse is identified by an ID number, a relationship number, and relationship name. If the spouse is not among the options, enter the spouse's information on the Relationships page.

Spouse's Occupation	Select from the following values: 1: Full-time Student 2: Employed, full-time 3: Employed, part-time 4: Unemployed 5: Other
Transfer to Relationships Page	Click this link to access the Relationships page to enter a person's relationship to a student in your system.
Living in Canada	Select if the student's spouse lives in Canada.
Spouse Full-Time Course load	Select if the student's spouse is taking a full-time course load in school.
Spouse 12 Week Program	Select if the student's spouse is enrolled in a 12 week program.
Spouse Institution	Enter the name of the spouse's institution if the student's spouse is enrolled in a program.
Spouse Last High School Date	Enter the date that the spouse last attended high school.
Spouse Gross Income	Enter the amount of the spouse's gross income.
Spouse Income Source	Select from the following values: 1: Ontario Disability Prgm 2: Family Benefits 3: General Welfare 4: Other

See Also

PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information"

Entering Signature and Next of Kin Information

Access the Signature/Next of Kin page (Financial Aid, Canadian Application Data, Create/Update FT Application, Signature/Next of Kin).

Student Financial Data

Parent Data

Spouse Info

Signature/Next of Kin

Fatana Abarta

ID: FA0001

Aid Year: 2005

Source: FT CSL

NID: 099707878

Institution: PSUNV

[Student Extensions](#)

CNAS Calc

Next of Kin:

Release To 1:

Release To 2:

[Relationships](#)

Signature Information

Find | View All

First

1 of 1

Last

Signer:

Signature Type

Date Signed

Signature/Next of Kin page

- Next of Kin

Select the next of kin for the student. You may need to go the Relationship page to add a person before you can select the person.
- Release To 1and Release To 2

Select the first and second person to whom your institution releases information about the student. You may need to go the Relationship page to add a person before you can select the person.
- Relationships

Click this link to access the Relationships page where you can enter a person's relationship to a student in your system.
- Signature Information
- Signer

Select a signer. Values are: *Applicant, Father, Mother, and Spouse*. You can have multiple signature information by adding additional rows.
- Signature Type

Select a signature type. Values are: *Collect Income Tax Info, Collect Personal Info, Part-time Appl Signature, and Release Personal Info*. You can have multiple signature types by adding additional rows.
- Date Signed

Enter the date signed for each signature type.

Maintaining Part-Time Student Data

Different Canadian financial aid applications are available for full-time and part-time students. Use the Part-time Application component to enter and maintain data for part-time students. If you have full-time application data in your system for a student, the system populates this data in the fields on the part-time application.

This section lists common elements and discusses how to:

- Enter student and dependency information.
- Enter student and spousal financial information.
- Enter study period information.

Common Elements Used in This Section

Part-time Student Extension

Click to access the Student Extensions page where you can override the institutional CNAS options for the student.

Pages Used to Maintain Part-Time Student Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Status/Residency	INST_PT_STDNT_A	Financial Aid, Canadian Application Data, Create/Update PT Application, Status Residency	Enter or view student and dependency information.
Student Extensions	STD_CNAS_PT_EXT	Click the Part-time Student Extensions link on the Status/Residency page..	Override institutional level options.
Financial Info	INST_PT_STDNT_CD	Financial Aid, Canadian Application Data, Create/Update PT Application, Financial Info	Enter or view student and spousal financial information.
Study Period Info	INST_PT_STDNT_EF	Financial Aid, Canadian Application Data, Create/Update PT Application, Study Period Info	Enter or view study period information.

Entering Student and Dependency Information

Access the Status/Residency page (Financial Aid, Canadian Application Data, Create/Update PT Application, Status Residency).

Status/ResidencyFinancial InfoStudy Period Info

Fatana Abarta

ID:FA0001

Aid Year:2005

Source:PT CSL

NID:099707878

Institution:PSUNV

[Part-time Student Extensions](#)

CNAS Calc

Date of Birth:04/15/1980

CNAS Application Date:10/22/2004

Gender:

Marital Status:

CSL Citizenship:N

Dependents 11 and Under:0

Dependents 12 to 18:0

Dependents 19 and Older:0

Part-time Weekly Child Care:0

*Student's Residence:ON

*Course Load Percentage:100.00

Part-time Reason:

Fed Year Cost of Attendance:15,134.00

Inst Year Cost of Attendance:15,134.00

☐ Prior SOG

☐ Perform SOG Grant Calculation

☐ SAP for previous SOG

Next of Kin:

[Relationships](#)

Status Residency page

- Date of Birth

Displays the student's date of birth.
- CNAS Application Date
(Canadian Need Analysis
System application date)

Displays the date of the CNAS application.
- Gender

Displays the student's gender.
- Marital Status

Displays the student's marital status.
- CSL Citizenship (Canada
student loan citizenship)

Indicates whether the student is a citizen.
- Dependents 11 and
Under

Enter the number of dependents aged eleven or younger.
- Dependents 12 to 18

Enter the number of dependents aged twelve to eighteen.
- Dependents 19 and
Older

Enter the number of dependents aged nineteen or older.
- Part-time Weekly Child
Care

Enter an amount if applicable.
- Student's Residence

Select the province in which the student lives.

Course Load Percentage	Enter the course load percentage the student is taking.
Part-time Reason	<div>Select from the following values:<div>1: Single Parent.<div>2: Elderly Dependents.<div>3: Restricted Mature Student.<div>4: Disabled.<div>5: Grade Improvement.<div>6: Excessive Debt.<div>7: Financial.<div>8: Course Not Available.<div>9: Program Almost Complete.<div>0: Other.</div></div></div></div></div></div></div></div></div></div></div>

Entering Student and Spouse Financial Information

Access the Financial Info page (Financial Aid, Canadian Application Data, Create/Update PT Application, Financial Info).

Status/Residency	Financial Info	Study Period Info
Fatana Abarta		ID: FA0001
Aid Year: 2005	Source: PT CSL	NID: 099707878 Institution: PSUNV Part-time Student Extensions CNAS Calc
Student		
Occupation:	<input type="text"/>	Weekly Hours: <input type="text" value="0"/> Gross Income: <input type="text" value="0"/>
Spouse		
Spouse ID:	<input type="text"/>	Weekly Hours: <input type="text" value="0"/>
Occupation:	<input type="text"/>	Gross Income: <input type="text" value="0"/>
Retirement Savings Value:	<input type="text" value="6,187"/>	Investment Value: <input type="text" value="300"/>
<input type="checkbox"/> Prior Canadian Student Loan	<input type="checkbox"/> Prior Part-Time Loan	Amount of Prior Part-time Loan: <input type="text" value="0"/>
<input type="checkbox"/> Defaulted Loan		Part-time Aid Requested: <input type="text"/>
<input type="checkbox"/> Student Signed	<input type="checkbox"/> Spouse Signed	

Financial Info page

Student

Occupation

Select from the following options: *Empl FT* (employed full-time), *Empl PT* (employed part-time), *FT Std* (full-time student), *Other*, and *Unemp* (unemployed).

Weekly Hours

Enter the student's weekly hours worked.

Gross Income

Enter the student's gross income.

Spouse

Spouse ID

Enter the spouse's unique identification.

Weekly Hours

Enter the spouse's weekly hours worked.

Occupation

Select from the following options: *Empl FT* (employed full-time), *Empl PT* (employed part-time), *FT Std* (full-time student), *Other*, and *Unemp* (unemployed).

Gross Income

Enter the spouse's gross income.

Retirement Savings Value

Enter the value of the student's retirement savings.

Investment Value

Enter the value of the student's investments.

Prior Canadian Student Loan	Select if the student has a prior Canadian student loan.
Prior Part-time Loan	Select if the student has a prior part-time loan.
Amount of Prior Part-time Loan	Enter the student's prior part-time loan amount.
Defaulted Loan	Select if the student has defaulted on a loan.
Part-time Aid Requested	Enter the amount of part-time aid requested.
Student Signed	Select if the student signed the application.
Spouse Signed	Select if the student's spouse signed the application.

Entering Study Period Information

Access the Study Period Info page (Financial Aid, Canadian Application Data, Create/Update PT Application, Study Period Info)..

Status/ResidencyFinancial InfoStudy Period Info

Fatana Abarta

ID:FA0001

Aid Year:2005

Source:PT CSL

NID:099707878

Institution:PSUNV

[Part-time Student Extensions](#)

CNAS Calc

Study Period Start Date:

31

Study Period End Date:

31

Anticipated Academic Program:

Tuition and Fees Component:

0

FA Number of Weeks:

33

Degree/Certificate:

Study Period Info page

Study Period Start Date and Study Period End Date	Enter or view the dates on which the study period begins and ends.
Anticipated Academic Program	Select an anticipated program for the student.
Tuition and Fees Component	Enter a tuition and fee amount.

- FA Number of Weeks** Enter the number of financial aid weeks.
- Degree/Certificate** Select a degree or certificate for the student. Values are:
- 1: Diploma
 - 2: Certificate
 - 3: Bachelor's Degree
 - 4: Master's Degree
 - 5: Doctoral Degree

Reviewing CNAS Calculation Results

This section discusses how to:

- View results of CNAS calculation 1.
- View results of CNAS calculation 2.
- View results of CNAS calculation 3.

Pages Used to Review CNAS Calculation Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CNAS Results	CNAS_RESULTS	Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results	View results of the calculations performed. You can run multiple calculations for a single student and view them by effective date and effective sequence.
CNAS Results 2	CNAS_RESULTS2	Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results2	View results of the calculations performed.
CNAS Results 3	CNAS_RESULTS3	Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results3	View results of the calculations performed.

Viewing Results of CNAS Calculation 1

Access the CNAS Results page (Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results).

CNAS Results		CNAS Results2		CNAS Results3	
Abbasi,Manan			ID: FA0004		
Aid Year: 2003		Academic Institution: PSUNV		Application Source Code: 0	
View All First 1 of 1 Last					
Effective Date: 05/31/2002		Effective Sequence: 1		+ -	
View All First 1 of 2 Last					
CNAS Rule Set: CSL		+ -			
Student Category: Single Dependent					
Total Initial Budget: 6,325					
CSL Amount:	573	Overaward Used:	0	Budget Reduction/Cap:	0
CSG Amount:	0	Overaward Balance:	0	Use Cost of Attendance:	Fed Year COA
Provincial Loan Amount:	0	CNAS Abort Flag:	N	FMM Use:	FM EFC
SOG Amount:	0	Full/Part Time:	F	Award Period Use:	Academic

CNAS Results page

CNAS Rule Set(Canadian Displays the rule set of the CNAS calculation.
Need Analysis System
rule set)

Student Category Indicates the student's dependency status.

Total Initial Budget Displays the student's budget.

CSL Amount (Canadian Displays the CSL loan eligibility amount.
student loan amount)

CSG Amount (Canadian Displays the CSG eligibility amount.
study grant amount)

Provincial Loan Amount Displays the provincial loan eligibility amount.

SOGAmount(special Displays the SOG eligibility amount.
opportunity grant amount)

Overaward Used Indicates whether overaward was used in the calculation.

Overaward Balance Displays the overaward balance amount.

CNAS Abort Flag Displays the CNAS abort flag.
(Canadian Need Analysis
System abort flag)

Full/Part Time Indicates whether the student is full-time or part-time.

Budget Reduction/Cap Displays the budget reduction amount.

Use Cost of Attendance	Displays the type of COA.
FM/IM Use (Federal methodology/institutional methodology use)	Displays whether the system used FM or IM in the calculation.
Award Period Use	Displays the award period that the system used for the calculation.

Viewing Results of CNAS Calculation 2

Access the CNAS Results2 page (Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results2).

CNAS Results		CNAS Results2		CNAS Results3	
Abbasi,Manan			ID: FA0004		
Aid Year: 2003		Academic Institution: PSUNV		Application Source Code: 0	
View All First 1 of 1 Last					
Effective Date: 05/30/2002		Effective Sequence: 1		+ -	
View All First 1 of 2 Last					
CNAS Rule Set: CSL		+ -			
Minimum Prestudy Contribution:		2,160		Father's Income Used: 24,068	
Actual Prestudy Contribution:		5,289		Mother's Income Used: 24,520	
Prestudy Contribution Used:		5,289		Parent's ADI: 588	
Study Period Inc Contribution:		0		Total Parent Contribution: 264	
Asset Contribution:		0		Parent Contribution for Studnt: 81	
Final Student Contribution:		5,289		Family Contribution: 5,370	
				Financial Need: 955	

CNAS Results2 page

Minimum Prestudy Contribution	Displays the student's minimum prestudy contribution.
Actual Prestudy Contribution	Displays the student's actual prestudy contribution from income.
Prestudy Contribution Used	Displays the amount of prestudy contribution used from income.
Study Period Inc Contribution (study period income contribution)	Displays the expected study period contribution from income.
Asset Contribution	Displays the contribution amount based on assets.

Final Student Contribution	Displays the student's final contribution amount.
Father's Income Used	Displays the father's income used for calculation.
Mother's Income Used	Displays the mother's income used for calculation.
Parent's ADI (parent's annual discretionary income)	Displays the parent's annual discretionary income.
Total Parental Contribution	Displays the total parent contribution.
Parent Contribution for Student	Displays the parent contribution for the student.
Family Contribution	Displays the total family contribution.
Financial Need	Displays the financial need for the student.

Viewing Results of CNAS Calculation 3

Access the CNAS Results3 page (Financial Aid, Canadian Application Data, View CNAS Results, CNAS Results3).

CNAS ResultsCNAS Results2CNAS Results3

Abbasi,MananID:FA0004

Aid Year:2003Academic Institution:PSUNVApplication Source Code:0

View AllFirst1 of 1Last

Effective Date:05/31/2002Effective Sequence:1

View AllFirst1 of 2Last

CNAS Rule Set:CSL

View AllFirst1 of 1Last

CNAS Message Number

14Full-time CNAS calculation process completed.

CNAS Results3 page

Viewing Audits

This section discusses how to:

- View changes made to applications.
- View changes made to extension data.

Pages Used to View Audits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Audit	CSL_AUDIT	Financial Aid, Canadian Application Data, View Application Audit, Application Audit	View a history of changes made to entries for the student application record.
Extension Audit	EXT_AUDIT	Financial Aid, Canadian Application Data, View Extension Audit, Extension Audit	View changes made to the Student Extension record.

Viewing Changes Made to Applications

Access the Application Audit page (Financial Aid, Canadian Application Data, View Application Audit, Application Audit).

Application Audit

Name: Abarta,Fatana **ID:** FA0001

Academic Institution: PSUNV **Aid Year:** 2005 **Application Source Code:** 0

[Find](#) | [View All](#) First 1-2 of 11 Last

Date and Time Stamp: 10/15/2004 9:37:00.997000AM **User ID:** PS
Field Name: SPS_FT_COURSELOAD **Record (Table) Name:** INST_STDNT_CSL
Old Value:
New Value: N

Date and Time Stamp: 10/15/2004 12:59:08.447000PM **User ID:** PS
Field Name: STD_RSDNT_LENGTH **Record (Table) Name:** INST_STDNT_CSL
Old Value: 2
New Value: 1

Application Audit page

Date and Time Stamp Displays the date and time changes were made to the application.

Field Name Displays the changed field name.

Old Value	Displays the previous value before change.
New Value	Displays the new value.
User ID	Displays the unique identification of the person who made the change.
Record (Table) Name	Displays the record/table name of the changed field.

Viewing Changes Made to Extension Data

Access the Extension Audit page (Financial Aid, Canadian Application Data, View Extension Audit, Extension Audit).

Extension Audit

Name: Abarta,Fatana

ID: FA0001

Academic Institution: PSUNV

Aid Year: 2005

CNAS Rule Set: CSL

Find | View All

First 1-2 of 18 Last

Date and Time Stamp: 10/15/2004 8:59:11.977000AM

User ID: PS

Field Name: EFF_STATUS

Record (Table) Name: STDNT_CNAS_EXT

Old Value:

New Value: A

Date and Time Stamp: 10/15/2004 8:59:11.977000AM

User ID: PS

Field Name: FM_IM_USE

Record (Table) Name: STDNT_CNAS_EXT

Old Value:

New Value: B

Extension Audit page

Date and Time Stamp	Displays the date and time changes were made to the extension record.
Field Name	Displays the changed field name.
Old Value	Displays the previous value before the change.
New Value	Displays the new value.
User ID	Displays the unique identification of the person who made the change.
Record (Table) Name	Displays the record/table name of the changed field.

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Inserting an ISIR Row

This section discusses how to create ISIR records for mass packaging.

See Also

Chapter 28, "Awarding and Packaging Students," page 983

Page Used to Insert an ISIR Row



<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ISIR Row Insert	RUNCTL_CAN_APP	Financial Aid, Canadian Application Data, Insert ISIR Rows, ISIR Row Insert	Create ISIR records for mass packaging.

Create ISIR Records for Mass Packaging

Access the ISIR Row Insert page (Financial Aid, Canadian Application Data, Insert ISIR Rows, ISIR Row Insert).

ISIR Row Insert

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Institution: PSUNV  PeopleSoft University
Aid Year: 2009  Financial Aid Year 2008 - 2009

ISIR Row Insert page

Institution Enter the institution for which to run the process.

Aid Year Enter the aid year for which to run the process.

Appendix A

Financial Aid Reports

This appendix provides an overview of Financial Aid reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

Financial Aid Reports: A to Z

This table lists the Financial Aid reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
SFA_AGGR Lifetime Aggregates	Used to review internally maintained aggregate data and the NSLDS reported total pushed into the aggregate aid table.	Financial Aid, Awards, Aggregates, Review Lifetime Aggregate, Lifetime Aggregate Report	SFA_RUN_AGGR_RPT
FA801 Award Data by Item Type	Used to review to whom each financial aid item type was awarded to, as well as whether the award has been disbursed to the student.	Financial Aid, Fund Management, FA801 Award Data by Item Type	RUNCTL_FA_RPT
FA821 Batch Packaging Summary	Used to review the number of students and the total amount awarded for each financial aid item type in a particular packaging plan during a Mass Packaging run.	Financial Aid, Mass Packaging, Mass Packaging Summary Report	RUNCTL_FA_RPT_821

Report ID and Report Name	Description	Navigation	Run Control Page
FA822 Batch Packaging Detail	Used to review the award package for each student awarded during a Mass Packaging run. The students are organized by packaging plan.	Financial Aid, Awards, Mass Packaging, Mass Packaging Detail Report	RUNCTL_FA_RPT_822
FA852 Loan Status Reports—Loan PNote Summary	Review the PNote Transmission Status for 1999/2000 PNotes and MPNs – can also be used to review institutional PNotes if they are defined as a loan document. Use after Loan Origination and Pnotes have been created.	Financial Aid, Loans, View Loan Status Reports, Loan PNote Summary	RUNCTL_FA_LN_RPT
Accepted Originations DL Accepted Originations	Review and monitor originated loans accepted by the LOC.	Financial Aid, Loans, Direct Lending Reconciliation, Accepted Originations Report	RUN_CNTL_FA853_RPT
FA854 DL Loans on Hold	Review and monitor loans placed on hold. Loans are placed on hold by the system when rejected origination acknowledgement, origination change acknowledgement, and disbursement acknowledgement files are received. You can also place loans on hold manually. Use after every import function.	Financial Aid, Loans, Direct Lending Reconciliation, Loans on Hold Report	RUN_CNTL_FA854_RPT
FA855 DL PLUS Credit Decision	Provides a list of decision statuses for PLUS loans, allowing you to advise the parent whether they qualify, need a cosigner, etc. Use after you receive the PLUS origination acknowledgement file.	Financial Aid, Loans, Direct Lending Reconciliation, PLUS Credit Decision	RUN_CNTL_FA855_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA856 DL Rejected Originations	Review and monitor origination and origination change acknowledgements rejected by the LOC. This report will assist you in identifying the reject reason(s). Use after the origination acknowledgement file is imported.	Financial Aid, Loans, Direct Lending Reconciliation, Rejected Originations Report	RUN_CNTL_FA856_RPT
FA857 DL Transmitted Originations	Review and monitor originations submitted to the LOC. The report is a cumulative list of originations. This allows you to track transmitted origination files and identify transmitted origination files that may have outstanding acknowledgments.	Financial Aid, Loans, Direct Lending Reconciliation, Origination Export Report	RUN_CNTL_FA857_RPT
FA858 DL Pending Origination Changes	Review and monitor transmitted changes made to previously originated loans. Use after sending out Origination Change files.	Financial Aid, Loans, Direct Lending Reconciliation, Origination Changes Report	RUN_CNTL_FA858_RPT
FA859 DL Transmitted Change Pending	Review and monitor changes made to loan records that are waiting for acknowledgements from transmitted origination data (Loan Action Status = <i>T—Transmitted</i>) previously submitted to the LOC. Run this in between importing and exporting Origination and Change files.	Financial Aid, Loans, Direct Lending Reconciliation, Origination Change Report	RUN_CNTL_FA859_RPT
FA860 DL Validation Errors	Review and monitor validation rejects. This report is designed to assist you in resolving potential errors prior to outbound Origination records. Use after you run the validation process.	Financial Aid, Loans, Direct Lending Reconciliation, Validation Errors Report	RUN_CNTL_FA860_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA861 DL Inbound Orig Ackn Errors	Review and monitor inbound student record(s) not loaded into the system because the inbound student record contained IDs that do not match existing IDs in current database. This report allows you to identify and correct conflicts. Use after Inbound files are loaded into the system. Note. This report only exists for Origination. Reports for other Direct Lending processes may be available in the future.	Financial Aid, Loans, Direct Lending Reconciliation, Inbound Errors Report	RUN_CNTL_FA861_RPT
FA866 DL Disbursement Errors	Review and monitor disbursements rejected by the LOC. The report assists you in resolving errors reported on the Disbursement Acknowledgement file. Use after the disbursement acknowledgement has been imported.	Financial Aid, Loans, Direct Lending Reconciliation, Disbursement Errors Report	RUN_CNTL_FA866_RPT
FA867 DL Disbursement Status	Review and monitor disbursement status and booked status for loans. Use weekly.	Financial Aid, Loans, Direct Lending Reconciliation, Disbursement Status Report	RUN_CNTL_FA867_RPT
FA868 DL Disbursement Booking Stat	Review and monitor Disbursement Booked and Unbooked status. Designed for use with Reconciliation Processing. Use weekly.	Financial Aid, Loans, Direct Lending Reconciliation, Disbursement Booking Report	RUN_CNTL_FA868_RPT
FA870 Print Pell Grant ESOA	Review and monitor Federal Pell Grant Fund allocations.	Financial Aid, Pell Payment, Cash Management Reports, Print Pell Grant ESOA	RUN_CNTL_PG_ESOA
FA871 YTD Originations	Generate a list of students who are in an origination year-to-date file sent by RFMS.	Financial Aid, Pell Payment, Year To Date Reports, YTD Originations	RUN_CNTL_PGOYTD_AL

Report ID and Report Name	Description	Navigation	Run Control Page
FA872 YTD Originations Errors	Review conflicting information from RFMS and your application tables.	Financial Aid, Pell Payment, Year To Date Reports, YTD Originations Errors	RUN_CNTL_PGOYTD_ER
FA873 YTD Disbursements	Generate a list of students who have been disbursed as of the year to date.	Financial Aid, Pell Payment, Year To Date Reports, YTD Disbursements	RUN_CNTL_PGDYTD_AL
FA874 YTD Disbursement Errors	Review conflicting information from RFMS and your application tables.	Financial Aid, Pell Payment, Year To Date Reports, YTD Disbursement Errors	RUN_CNTL_PGDYTD_ER
FA875 Pell MRR Report by Batch	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific batches. Use after the MRR inbound file is imported.	Financial Aid, Pell Payment, Multiple Reporting, MRR by Batch	RUN_CNTL_FA_875_RPT
FA875A Pell MRR Report	Review and monitor POP (potential overaward payment) and Blocked Institution situation. Use after the MRR inbound file is imported.	Financial Aid, Pell Payment, Multiple Reporting, MRR Report	RUN_CNTL_PG_MRR
FA875B Pell MRR Report by MRR Status	Review and monitor POP (potential overaward payment) and Blocked Institution situation by specific Status codes. Use after the MRR inbound file is imported.	Financial Aid, Pell Payment, Multiple Reporting, MRR by Status	RUN_CNTL_FA875B_RP
FA876 Pell Originations by Action Cd	Review and monitor students whose originations are acknowledged.	Financial Aid, Pell Payment, Origination Reports, Originations by Action Code	RUN_CNTL_PG_OACTN
FA877 Pell Disbursements by Action Cd	Review or monitor all students whose Disbursement records have been acknowledged.	Financial Aid, Pell Payment, Disbursement Reports, Disbursements by Action Code	RUN_CNTL_PG_DACTN

Report ID and Report Name	Description	Navigation	Run Control Page
FA878 Pell Origination Records	Review and monitor from your Pell population what has been originated and whether the records have been imported or exported from the application tables. Use after you have run the origination process and after origination records have been exported, or after origination acknowledgement files have been imported.	Financial Aid, Pell Payment, Origination Reports, Origination Import and Export	RUN_CNTL_FA878_RPT
FA879 Pell Origination by Orig Stat	Review and monitor originations and current origination status. Displays status of all origination records. You can run the report for one of seven different statuses: Accepted, Corrected, Originated, Rejected, Transmitted, Changed to Origination, and Cancelled.	Financial Aid, Pell Payment, Origination Reports, Origination Status	RUN_CNTL_FA879_RPT
FA880 Pell Originations by Batch	Determines which detail records are included in a specific batch.	Financial Aid, Pell Payment, Origination Reports, Originations by Batch	RUN_CNTL_FA880_RPT
FA880A Rejected Pell Originations by Batch	Determines which Pell origination records are rejected by RFMS in a specific batch.	Financial Aid, Pell Payment, Origination Reports, Rejected Originations by Batch	RUN_CNTL_FA880A_RP
FA881 Pell Disbursements by Batch	Review detail records included in a specific batch.	Financial Aid, Pell Payment, Disbursement Reports, Disbursements by Batch	RUN_CNTL_FA881_RPT
FA881A Pell Disbursements by Batch	Review and monitor Pell Disbursement records rejected by RFMS in a specific batch.	Financial Aid, Pell Payment, Disbursement Reports, Rejected Disbursement by Batch	RUN_CNTL_FA881_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA882 Pell Records by Trans Stat	Review and monitor students in different transaction statuses. You can run the report by using one of five different statuses: Cancel, On Hold, Ready, Review, and Transmitted. Depending on the status, the report can be run after origination or disbursement inbound records have been imported.	Financial Aid, Pell Payment, Origination Reports, Transaction Status	RUN_CNTL_FA882_RPT
FA883 Pell Disbursement Records	Review and monitor which student records have either had disbursement requests made or actual disbursements acknowledged. Reports consist of all disbursement status types.	Financial Aid, Pell Payment, Disbursement Reports, Disbursement Records	RUN_CNTL_FA883_RPT
FA884 Disbursements by Dsb Stat	Review or monitor the status of disbursement records that have been imported or exported. You can run the report for one of seven different statuses.	Financial Aid, Pell Payment, Disbursement Reports, Disbursements by Status	RUN_CNTL_FA884_RPT
FA885 Pell Cash Management	Review and monitor your cash management activity.	Financial Aid, Pell Payment, Cash Management Reports, Cash Management	RUN_CNTL_FA885_RPT
FA886 Pell Disbursement Ackn Batch	Review and monitor student disbursement records acknowledged by RFMS in a specific batch.	Financial Aid, Pell Payment, Disbursement Reports, Disbursement Acknowledgment	RUN_CNTL_FA886RPT_GBL
FA887 Pell Origination Acknowledgements by Batch	Lists students who have origination acknowledgement records by a specific batch.	Financial Aid, Pell Payment, Origination Reports, Origination Acknowledgement	RUN_CNTL_FA887_RPT
FA888 Pell Awds w/o Orig	Select all students who have Pell awards (on the Awards pages) who do NOT have Pell Origination records.	Financial Aid, Pell Payment, Origination Reports, Records With No Origination	RUN_CNTL_FA888_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA900 CL Rejected Application	Review and monitor applications with CommonLine reject codes. The report does not report Change Transaction errors. Use after loading Application Response files.	Financial Aid, Loans, Commonline Reconciliation, Rejected Application Report	RUN_CNTL_FA900_RPT
FA901 CommonLine Loans on Hold	Review and monitor FFELP and Alternative loans placed on hold. Holds can be placed automatically by the CommonLine Loan In, CommonLine Loan Out and manually through the CommonLine Loan Orig Trans page.	Financial Aid, Loans, Commonline Reconciliation, Loans on Hold Report	RUN_CNTL_FA901_RPT
FA902 CommonLine Validation Errors	Review originated loans that have failed the loan validation process. The report selects records that have failed validation and those that failed when run in simulation mode. Use post validation.	Financial Aid, Loans, Commonline Reconciliation, Validation Error Report	RUN_CNTL_FA902_RPT
FA903 CommonLine 4 Application Response Load Errors	Reports all CommonLine 4 application response records that erred when the CommonLine Loan In process was run. The report displays information necessary to clear the error conditions so that the record loads. Use after loading Application Response files. Setting the Load Status to Processed removes records from the report.	File Management, CommonLine Loans, CL4 Load Error Report	RUN_CNTL_FA903_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA904 CommonLine 4 School Certification Requests	<p>Reports all School Certification requests delivered on a CommonLine 4 Application Response file. The report provides the information necessary to process the loan request. You must enter enough information about the borrower and loan so that the loan can be originated by the loan system. Use after running FA903 and detecting school certification request load errors.</p> <p>Setting the Load Status to Processed removes records from the report.</p>	Financial Aid, Loans, Commonline Reconciliation, CL4 Certification Request Rpt	RUN_CNTL_FA904_RPT
FA905 CommonLine Application Response Delinquencies	<p>Reports originated and transmitted loan records where a response from the loan agency has not been received.</p> <p>A similar report can also be derived from the FA850 report.</p>	Financial Aid, Loans, Commonline Reconciliation, Pending Response Report	RUN_CNTL_FA905_RPT
FA906 Award vs. Disbursement Reconciliation	Reports selected financial aid item types where the awarded accept amount does not match the disbursed amount. Run daily.	Financial Aid, Disbursement, Reconciliation Report	RUN_CNTL_FA906_RPT
FA907 CommonLine 4 EFT Reconciliation	<p>Lists EFT disbursements where the EFT amount has not yet been disbursed. Sorted by EFT batch receipt date.</p> <p>Run daily to insure that loan funds are disbursed and returned in compliance with federal regulations. Used in conjunction with the CommonLine Disbursement Maintenance page.</p>	Financial Aid, Loans, CommonLine Reconciliation, CL4 EFT Discrepancy Report	RUN_CNTL_FA907_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FA909 CommonLine Check Reconciliation	Lists all loan checks tracked on the CommonLine Disbursement Maintenance page where the check amount does not match the amount paid on the student's account. The report displays the data on the CommonLine Disbursement Maintenance page. Run daily to ensure that loan funds are disbursed and returned in compliance with federal regulations.	Financial Aid, Loans, Commonline Reconciliation, Check Reconciliation Report	RUN_CNTL_FA909_RPT
FA913			
FA914 ISIR Load Summary	Provides a summary of all ISIR batches that have been loaded with statistics on the load status of the ISIRs in each batch.	Financial Aid, File Management, ISIR Import, ISIR Load Summary Report	RUNCTL_FA914
FA919 ISIR Suspense Detail	Provides a detailed report of all ISIRs that suspended or are set to error by the ISIR Load program. Data on the report derives from the ISIR Suspense Management page. Run after the FAPSAR00 process is run.	Financial Aid, File Management, ISIR Import, ISIR Suspense Detail Report	RUNCTL_FA919
FA920 Fund Roster	Used to review total offered, accepted, authorized, and disbursed amounts for the financial aid item types you specify. A list of students and their offered, accepted, authorized, and disbursed amounts is provided for each financial aid item type.	Financial Aid, Fund Management, Fund Roster	RUN_CNTL_FA920_RPT
FA921 NSLDS FAT Load Errors	Provides a report of NSLDS Transfer Alert file records that were unable to load into the database. Users must resolve the error and rerun the NSLDS Load process to resolve the error.	Financial Aid, File Management, NSLDS, NSLDS FAT Load Error Report	RUNCTL_FA921

Report ID and Report Name	Description	Navigation	Run Control Page
FA922 Overaward Report	Used to review a list of students who have been overawarded. Displays the amount of the overaward and information about the student's COA, EFC, need, and total over awarded amount.	Financial Aid, Awards, Generate Overaward Report	RUN_CNTL_FA922_RPT
FA923 Pell Reconciliation Report	Review records reconciled with RFMS.	Financial Aid, Pell Payment, Cash Management Reports, Reconciliation Report	RUN_CNTL_FA_923_RPT
FA924 NSLDS Alert File Report	Provides a report that displays the NSLDS change flags for loaded NSLDS records that have not yet been reviewed by the staff. This report matches what is displayed in the NSLDS Change Review page.	Financial Aid, File Management, NSLDS, NSLDS Alert File Report	RUNCTL_FA924
FA925 System Generated ISIRs	Identifies why a system generated ISIR record was created. Run prior to loading system generated ISIR files. You may want to suspend all system generated files before running this report because suspending the file will cause the student's ID to be determined and printed on the report.	Financial Aid, File Management, ISIR Import, System Generated ISIR Report	SFA_RUNCTL_FA928
FADLBOOK DL Originations Booking Status	Returns all loans for a specified booking status, aid year, and institution. Use after you inbound the disbursement file or whenever necessary.	Financial Aid, Loans, Direct Lending Reconciliation, Booking Status Report	RUN_CNTL_FADLBOOK
FADLEXCP DL Disbursement Exceptions	Identifies mismatched statuses between origination, disbursements, and the DLSAS booking status. Use after the DLSAS file has been imported and processed.	Financial Aid, Loans, Direct Lending Reconciliation, Report Disbursement Exception Summary	RUNCTL_FA_EXCEP_LN

Report ID and Report Name	Description	Navigation	Run Control Page
FADLSAS DL School Account Statement	Review Cash Summary Section, Cash Detail Section and the Loan Detail Section of the DSAS file received from the LOC. Use after the DSAS file has been imported to the EDI Manager staging tables.	Financial Aid, Loans, DL School Account Summary, Generate DLSAS Report	RUNCTL_DLSAS
FAISRJAS ISIR assumption/reject override	Creates a report that lists students who have assumptions and/or rejects that have no respective overrides made to them or who have overrides made but no assumptions or rejects. Use this list to identify which students need to have assumption overrides applied manually. This report is not aid-year specific.	Financial Aid, File Management, ISIR Import, CPS Reject/Assumption Report	RUNCNTL_FAISRJAS
FALPNERR DL PNote Error	Takes PNote reject codes from the PNote acknowledge file and lists by PNote ID and error type. Use after you receive your Promissory Acknowledgement file.	Financial Aid, Loans, Direct Lending Disbursements, Disbursement Errors	RUN_CNTL_DL_RPT
FAMANFS2 DL Print Manifest Report Plus	Generates a PLUS loan manifest. Use after PLUS notes have been signed and received.	Financial Aid, Loans, Direct Lending Management, Print Manifest Report Plus	RUNCTL_MANIFEST2
FAMANFS3 DL Print Manifest Report Staf	Generates a Stafford loan manifest. Use after MPNs have been signed and received.	Financial Aid, Loans, Direct Lending Management, Print Manifest Report Stafford	RUNCTL_MANIFEST3
FAORIGRJ DL Rejected Origination Changes	Review the origination change files the COD rejected. Run before you inbound the Origination Change Acknowledgement file.	Financial Aid, Loans, Direct Lending Management, Rejected Origination Changes	RUN_CNTL_DL_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
FATIVRTN Return of TIV Funds Report	View worksheet calculations, return of funds by school and student, institutional charges, number of days since the withdrawal date, and career totals.	Financial Aid, Return of Title IV Funds, Return of TIV Aid Report	RUN_CNTL_FATIVRTN
SFA903 CRC Load Error Report	Used to list all inbound transactions that have not loaded into the application tables due to an error during the CRC Inbound process.	Financial Aid, File Management, CommonLine Loans, CRC Load Error Report	SFA_CRC_903_RPT
SFA907 CRC EFT Batch Reconciliation Report	Used to list all processed records in selected disbursement roster (EFT) or disbursement forecast files.	Financial Aid, Loans, CommonLine Reconciliation, CRC EFT Reconciliation Report	SFA_CRC_EFT_RPT
SFA9071 CRC EFT Reconciliation Reports	Used to view undisbursed roster transactions.	Financial Aid, Loans, CommonLine Reconciliation CRC EFT Discrepancy Reports	SFA_CRC_EFT_PD_RPT
SFA9072 CRC EFT Paid Amount Discrepancy Report	Used to view CRC paid amounts not equal to EFT amount.	Financial Aid, Loans, CommonLine Reconciliation CRC EFT Discrepancy Reports	SFA_CRC_EFT_PD_RPT

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Numerics/Symbols

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